The People and Politics of Latin America

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The People and Politics of Latin America

A HISTORY BY
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What memory is to the individual,
History is to the race.

THE ATHENÆUM PRESS

GINN AND COMPANY

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PRINTED IN THE UNITED STATES OF AMERICA

632.12

GINN AND COMPANY
BOSTON · NEW YORK · CHICAGO · LONDON
ATLANTA · DALLAS · COLUMBUS · SAN FRANCISCO

PREFACE

This book is intended primarily for use as a text by college and university students.

As the title suggests, considerable attention has been given to the people of Latin America; for the history and characteristics of the individual countries, as well as of Latin America in general, can be explained only by the qualities found in their population. This fact accounts for the long chapters on the American aborigines and on the making of the Hispanic peoples.

Obviously, a book as inclusive as this volume must be based largely on secondary works, and to such—especially to a number of excellent special studies—I am greatly indebted. But in numerous cases where secondary writings were inadequate for the determination of facts or for securing illuminating details I consulted the original sources.

The works of authors referred to in the text are listed in the appended bibliography; but the bibliography is not completely representative of the authorities made use of in the preparation of this book. Most official documents consulted are not listed, for the general reader and general student are not interested in them and the specialist will have no difficulty in hunting them out. On the other hand, a few secondary works not actually used in writing the book have been added to the bibliography because of their value for the general student, especially if he has not access to a large library. Specific topics and page references have not been supplied; for I feel that students should become acquainted with books through using tables of contents and indexes.

It seems necessary to explain the meaning with which certain rather confusing terms have been used. The term *Latin America* is intended to include Haiti, whose European culture is of French origin; Brazil, whose motherland is Portugal; and the eighteen countries of the Western World which were once colonies of Spain. *Hispanic* is employed in its broader sense to refer to matters Portuguese as well as Spanish. To avoid clumsiness of expression, *American* is at times used with specific reference to the United States of America, as well as often being given a broader and more comprehensive significance; but in the former case the meaning is made clear from the context.

In connection with the preparation of this volume I have visited and traveled in all the Latin-American countries. In 1924 I spent some months as a free lance wandering through Mexico, Central America, and Panama. In 1926–1927, while on a leave of absence from Goucher College, I made a Latin-American educational survey for the American Association of University Women, visiting the ten countries of South America, the three states of the Caribbean, and also Panama and Mexico. In the Latin-American countries librarians displayed the greatest courtesy in making accessible to me the works in their care. Other Latin-Americans were helpful in many ways and showed great patience and good nature in discussing historical matters with me. My thanks for their friendly coöperation are also due to many of my fellow countrymen whom I met in Latin America. Members of the staffs of the Baltimore libraries and the Library of Congress have served me well. Much aid has come from the officers of the Pan-American Union. Professor Elizabeth Nitchie of the Department of English of Goucher College, who read the whole of my manuscript, has my gratitude for many helpful suggestions. I am further indebted in various ways to the following friends in the Department of Romance Languages at Goucher: Señorita Eudofilia Arboleda, Dr. Grace L. McCann, and Professors Esther J. Crooks and Charles W. Lemmi.

MARY W. WILLIAMS

GOUCHER COLLEGE

CONTENTS

CHAPTER PAGE

I. The Geographic Setting and its Influence 1

II. The Aboriginal Americans 17

III. The Making of the Hispanic Peoples 64

IV. The Hispanic Invasion of Aboriginal America . . . 102

V. Political Administration of the Spanish Indies . . . 149

VI. Spain's Economic Administration of her Colonies . . 164

VII. The Church in the Spanish Indies 179

VIII. Economic Activities in the Spanish Colonies 193

IX. Education, Learning, and the Fine Arts in the Indies 209

X. Spanish Colonial Society 228

XI. Colonial Development of Brazil 245

XII. The Rise and Fall of Saint-Domingue 276

XIII. The Wars for Hispanic-American Independence . . . 287

XIV. The End of Spanish Rule in America 324

XV. Problems of Independence 338

XVI. Haiti 357

XVII. The Dominican Republic 374

XVIII. Cuba 391

XIX. Central America 411

XX. Mexico: Empire and Republic 443

XXI. New Granada, or Colombia, and Panama 496

XXII. Venezuela 523

XXIII. Ecuador 537

XXIV. Bolivia 550

XXV. Peru 564

XXVI. Chile 584

XXVII. Paraguay 617

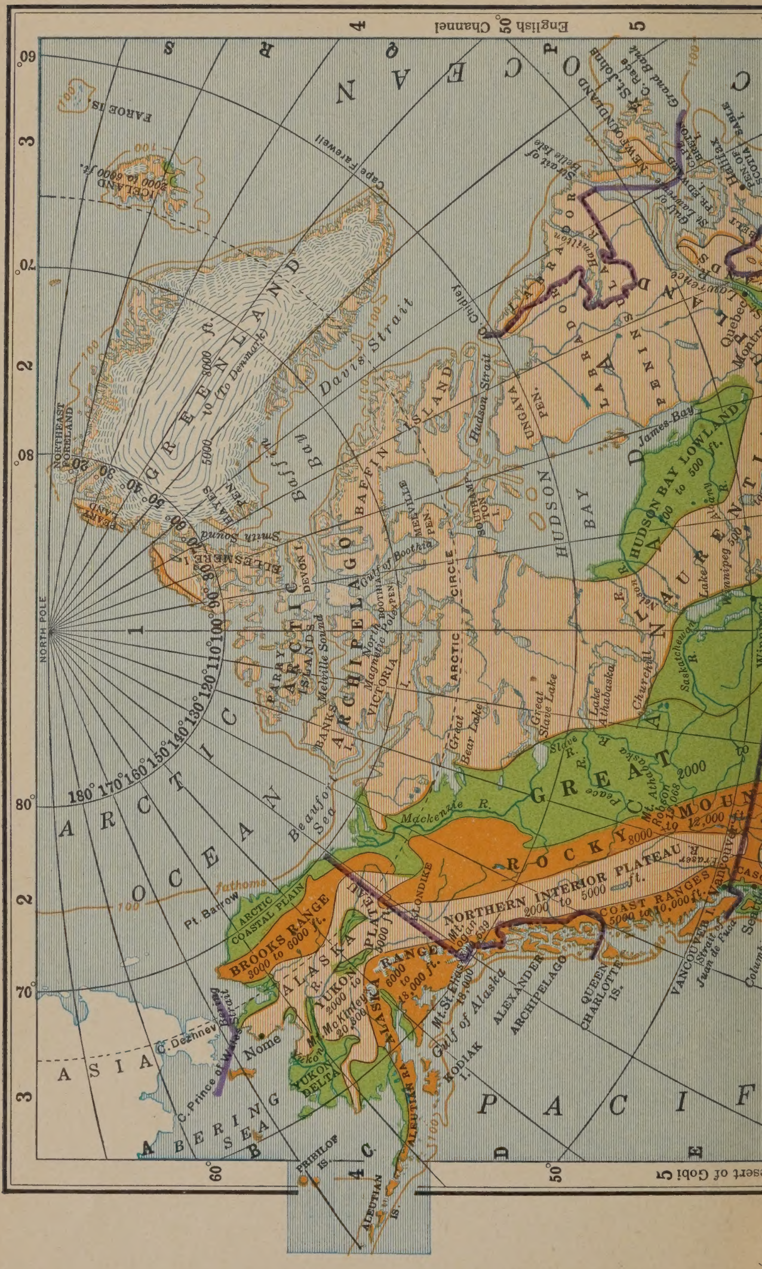
XXVIII. Uruguay 634

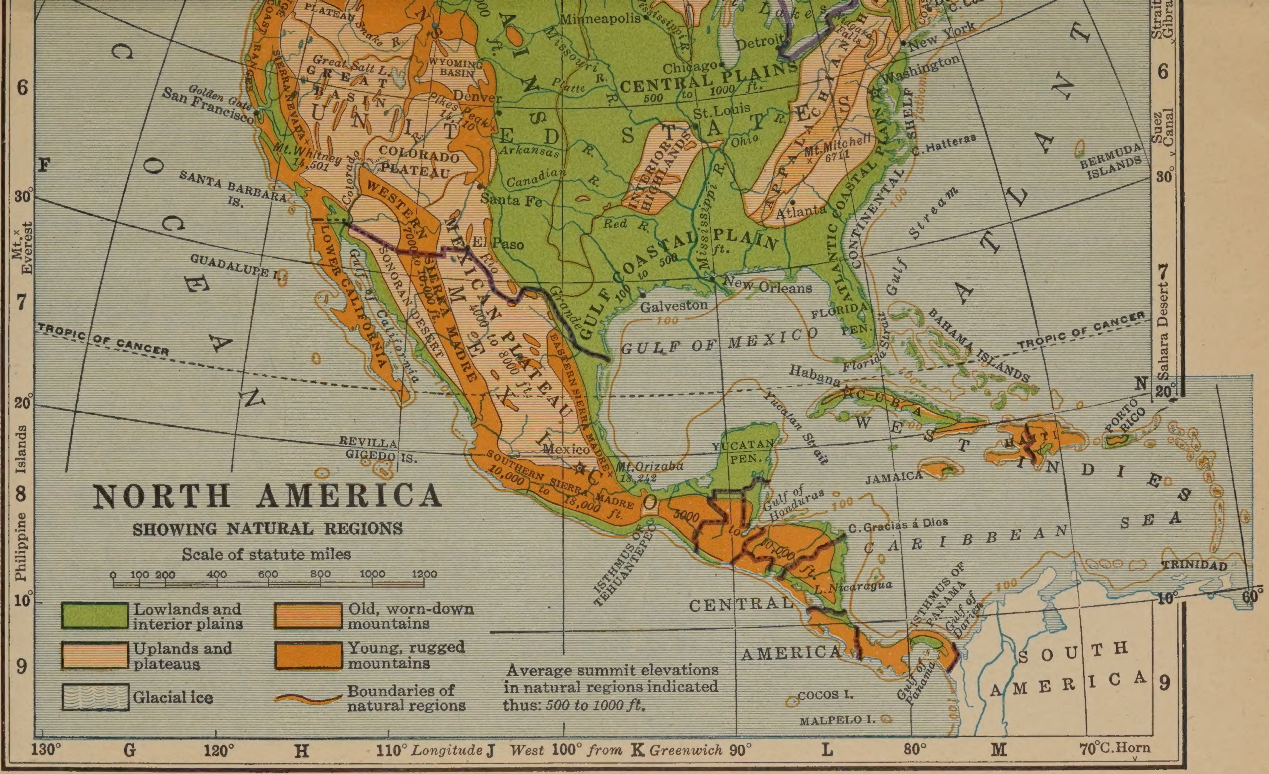
CHAPTER PAGE
XXIX. The Argentine Nation 648
XXX. Brazil: Empire and Republic 686
XXXI. Latin-American Social Evolution since 1825 731
XXXII. Literature and Art in Hispanic America 743
XXXIII. Regional Groupings and World Relationships of Latin America 778

BIBLIOGRAPHY 799
INDEX 821

LIST OF MAPS

PAGE
North America—Showing Natural Regions (in colors) to precede page 1
South America—Showing Natural Regions (in colors) 16
The Maya Country, showing Important Ruins 22
The Iberian Peninsula in 1037 76
The Iberian Peninsula in 1491 79
Voyages of Diaz, Da Gama, and Magellan 127
Latin-American Political Organization in 1784 (in colors) 160
Jesuit Missions in the North Plata Basin 186
The Latin-American States in 1826 (in colors) 328
Haiti, showing the Achievements of the Public Health Service of the American Occupation 371
The Republic of Cuba 393
Central America about 1850 419
The United States of Mexico (in colors) 448
The Panama Canal Zone, the Canal, and Adjoining Parts of the Republic of Panama 509
Ecuador and Territory involved in Boundary Disputes 547
Territory involved in the Treaties ending the War of the Pacific . . 575
Territory involved in Boundary Disputes of Paraguay 627
Argentina (in colors) 656
The United States of Brazil (in colors) 720


ARCTIC OCEAN
NORTH POLE
GREENLAND
2000 to 8000 ft.
(To Denmark)
NORTHEAST FORELAND
PEARY LAND
HAYES PEN.
ICELAND
2000 to 6000 ft.
FAROE IS.
Cape Farewell
Davis Strait
Baffin Bay
Smith Sound
ELLESMERE I.
DEVON I.
ARCTIC ARCHIPELAGO
PARRY ISLANDS
Melville Sound
BANKS I.
VICTORIA I.
BAFFIN ISLAND
North Magnetic Pole
BOOTHIA PEN.
Gulf of Boothia
MELVILLE PEN.
SOUTHAMPTON I.
ARCTIC CIRCLE
Hudson Strait
C. Chidley
UNGAVA PEN.
HUDSON BAY
James Bay
LABRADOR PENINSULA
LABRADOR
Hamilton R.
Strait of Belle Isle
NEWFOUNDLAND
St. Johns
C. Race
Grand Bank
C. Breton
Gulf of St. Lawrence
Pr. Edward I.
Halifax
NOVA SCOTIA
SABLE I.
St. Lawrence R.
Quebec
Montreal
HUDSON BAY LOWLAND
100 to 500 ft.
Albany R.
Nelson R.
Lake Winnipeg
Saskatchewan R.
Churchill R.
Lake Athabaska
Athabaska R.
Great Slave Lake
Slave R.
Great Bear Lake
Peace R.
Mackenzie R.
Beaufort Sea
Pt. Barrow
ARCTIC COASTAL PLAIN
BROOKS RANGE
3000 to 6000 ft.
ALASKA
YUKON PLATEAU
2000 to 5000 ft.
KLONDIKE
Yukon R.
YUKON DELTA
ALASKA RANGE
6000 to 18,000 ft.
Mt. McKinley 20,300
Mt. St. Elias 18,000
Mt. Logan 19,539
NORTHERN INTERIOR PLATEAU
2000 to 5000 ft.
ROCKY MOUNTAINS
8000 to 12,000 ft.
Mt. Robson 13,068
GREAT PLAINS
2000
COAST RANGES
5000 to 10,000 ft.
Fraser R.
Vancouver
VANCOUVER I.
Strait of Juan de Fuca
QUEEN CHARLOTTE IS.
ALEXANDER ARCHIPELAGO
Gulf of Alaska
KODIAK I.
ALEUTIAN RA.
ALEUTIAN IS.
PRIBILOF IS.
BERING SEA
Nome
C. Prince of Wales
Bering Strait
C. Dezhnev
ASIA
PACIFIC
Atlantic OCEAN
English Channel
Desert of Gobi
fathoms
100
180° 170° 160° 150° 140° 130° 120° 110° 100° 90° 80° 70° 60° 50° 40° 30° 20°
60° 70° 80° 50°
1 2 3 4 5
A B C D E
P Q R S



NORTH AMERICA

SHOWING NATURAL REGIONS

Scale of statute miles
0 100 200 400 600 800 1000 1200
Lowlands and interior plains
Uplands and plateaus
Glacial ice
Old, worn-down mountains
Young, rugged mountains
Boundaries of natural regions
Average summit elevations in natural regions indicated thus: 500 to 1000 ft.
Minneapolis
Mississippi R.
Detroit
Chicago
CENTRAL PLAINS 500 to 1000 ft.
New York
Washington
Niagara Falls
St. Louis
Ohio
Missouri R.
Platte R.
UNITED STATES
Denver
Pikes Peak 14,110
WYOMING BASIN
GREAT BASIN
Great Salt L.
Snake R.
PLATEAU
COAST RANGES
SIERRA NEVADA
Golden Gate
San Francisco
Mt. Whitney 14,501
COLORADO PLATEAU
Colorado R.
Arkansas R.
Canadian R.
Santa Fe
Red R.
INTERIOR HIGHLANDS
APPALACHIAN
Mt. Mitchell 6711
Atlanta
ATLANTIC COASTAL PLAIN
CONTINENTAL SHELF
C. Hatteras
Gulf Stream
BERMUDA ISLANDS
ATLANTIC
GULF COASTAL PLAIN 100 to 500 ft.
Mississippi R.
New Orleans
Galveston
El Paso
Rio Grande
SANTA BARBARA IS.
GUADALUPE I.
OCEAN
WESTERN SIERRA MADRE 7000 to 10,000 ft.
MEXICAN PLATEAU 4000 to 8000 ft.
EASTERN SIERRA MADRE
SONORAN DESERT
LOWER CALIFORNIA
Gulf of California
MEXICO
Mexico
Mt. Orizaba 18,242
SOUTHERN SIERRA MADRE 10,000 to 18,000 ft.
REVILLA GIGEDO IS.
TROPIC OF CANCER
GULF OF MEXICO
FLORIDA PEN.
Florida Strait
BAHAMA ISLANDS
Habana
CUBA
Yucatan Strait
YUCATAN PEN.
Gulf of Honduras
5000 to 10,000 ft.
ISTHMUS OF TEHUANTEPEC
CENTRAL AMERICA
L. Nicaragua
C. Gracias á Dios
JAMAICA
HAITI
PORTO RICO
WEST INDIES
CARIBBEAN SEA
TRINIDAD
ISTHMUS OF PANAMA
Gulf of Darien
Gulf of Panama
COCOS I.
MALPELO I.
SOUTH AMERICA
100
F
G
H
J
K
L
M
N
6
7
8
9
130°
120°
110° Longitude West 100° from Greenwich 90°
80°
70° C. Horn
60°
30°
20°
10°
Mt. Everest
Philippine Islands
Strait Gibraltar
Suez Canal
Sahara Desert

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The People and Politics of Latin America: A History

I

THE GEOGRAPHIC SETTING AND ITS INFLUENCE

So much is certain: history lies not near but in nature.—Carl Ritter

THE New World claims of Spain and Portugal, taken together, once covered more than a continent and a half. From Cape Horn in the south to Chesapeake Bay in the northeast and Nootka Sound in the far northwest, they extended; and they took in, as well, the West Indies and all other islands adjacent to the coasts on which flew the flag of either nation. Roughly speaking, actual occupation and colonization by the two countries remained, however, to the south of a line drawn from ocean to ocean between the northern limits of California and those of Florida. At present the Río Grande forms the continental boundary between Anglo-America and Latin America; and a large fraction of the West Indian islands has been so long under the political control and cultural influence of North European peoples that it cannot now be properly called Latin America. Yet, shrunken though it is, the Latin America of today covers more than half the land surface of the Western Hemisphere, or about nine million square miles, an area three times that of the United States. This chapter will be concerned primarily with the geographic background of the twenty independent countries lying to the southeast of the Río Grande.

While the northern continent of America almost touches Asia at its westernmost point, the southern continent swings much nearer to the Old World than is commonly realized by most

Anglo-Americans. Brazil extends about twenty-six hundred miles to the east of a line passing through New York City, thus bringing South America about as close to Europe as it is to the United States—a fact that has left its mark upon the southern continent. Nevertheless South America is the most unluckily situated of all the large land masses of the world, through being thrust far down into the southern, or water, hemisphere, more than fifteen hundred miles closer to the antarctic circle than is Africa. This isolation from the main eastward-westward lines of travel made it the "neglected continent."

In comparison with its northern neighbor, South America is also unfortunate in its shape with reference to its position in the climatic zones. The portion of greatest width, including about two thirds of the total area, lies wholly within the tropics, and the thinly tapering remainder projects so far south as to run to the opposite extreme of a climate so cold as to be unfavorable to progress. Latin America, as a whole, is even more completely within the torrid zone than its South American part, for the tropic of Cancer cuts almost completely to the north of the West Indies and likewise leaves about half of Mexico within the range of direct solar rays. The handicap of this tropical location has been reflected in Latin-American history.

The southern continent is much more rugged than the northern, and its mountains are loftier; but in both continents the eastern portion is geologically older than the western and is sinking and wearing away. The Brazilian Highlands, which form the secondary axis of South America, are a plateau varying from one thousand to three thousand feet in elevation, broken by ranges of sloping, rounded peaks, some of them reaching a height of about nine thousand feet. In contrast with these mountains is the Cerro do Mar, or Coast Range, running southward from Rio de Janeiro. Its peaks rise directly from the sea and in many cases are remarkably sharp and tapering, giving the impression of gigantic sentinels guarding the continent.

To the north and south of the Cerro do Mar are narrow coastal plains which merge into spacious river valleys. Some distance from the north coast are the highlands of Guiana and Venezuela, geological contemporaries of those of Brazil and of about the same elevation. They have been little explored, and, because of their location in the heart of the tropics and rather far from the ocean highway, have been of little historical importance to Latin America. In the Greater Antilles of the West Indies, likewise a region of sinking coast lines, is a third worn-down mountain system. Here the highlands, which have an eastern and western direction, culminate in Mount Tina, in the Dominican Republic, with an elevation of ten thousand three hundred feet.

The western side of South America is geologically youthful and growing; its coast line is, on the whole, a rising one, with few and shallow harbors. Here lie the Andes, the primary mountain axis, a part of the great Cordilleran system extending from Cape Horn to Bering Strait. In the far south they are marshaled into rather closely placed chains and do not exceed one hundred miles in width; but beyond the tropic of Capricorn, in Bolivia and Peru, they spread into a plateau four hundred miles across and from ten thousand to thirteen thousand feet high, traversed by majestic ranges. In northern Peru the mountains again become fairly compact, and continue so to the coast of the Caribbean. For much of their more than four thousand miles of length, the Andes rise almost sheer out of the Pacific, leaving at most little but a ledge of coastal plain; and for more than three thousand miles they offer very few passes even as low as twelve thousand feet. Hence these mighty mountains have served as barriers, separating and differentiating the peoples who have lived on opposite sides of their crest.

In the narrow Isthmus of Panama the Cordilleran backbone persists as low, unorganized mountains. These rise rapidly as the land broadens, and multiply into flaring chains which, in Mexico, appear as two widely divergent mountain ranges—the Sierra Madre Occidental and the Sierra Madre Oriental. The former keeps generally parallel to the Pacific coast; the latter follows the Gulf of Mexico. Between the two is the great triangular Mexican Plateau, varying in height from about eight thousand feet in the south to three thousand at the Rio Grande. This table-land also is broken by lofty mountain spurs and chains.

In Latin America the Cordillera is accentuated for most of its course by noble peaks, many of them so lofty as to be crowned, even within the tropics, with everlasting snow. In Mexico two of the mountains, Orizaba and Popocatepetl, exceed seventeen thousand feet; Tolima, a Colombian peak, is more than eighteen thousand feet high; Chimborazo, in Ecuador, and Illimani and Sorata, in Bolivia, are well above twenty thousand; Aconcagua, in western Argentina, towers more than twenty-three thousand feet above the Pacific and is the queen of the whole Cordilleran system and the highest mountain peak in the Western Hemisphere. Practically throughout the length of the Latin-American Cordillera there are volcanoes—some of them organic parts of the mountain system; others, isolated peaks rising from the plain. Many are active and are constantly in a steaming condition, and occasionally they belch forth clouds of smoke and rivers of melted rock. Central America and Ecuador especially abound in active volcanoes, which give a sublimely beautiful and awe-inspiring character to the rich tropical landscape. Since the whole region traversed by the primary mountain axis is undergoing geologic growth and evolution, hardly any part from Mexico to Chile has failed during historic times to be visited repeatedly by devastating earthquakes.

Latin America as a whole is rich in minerals, but the countries apparently most favored in this regard are Brazil, Chile, Bolivia, Peru, Colombia, and Mexico. Nitrates, borax, and salt abound in Chile, and much coal exists there, as well as in Brazil and Mexico; here and there, in volcanic craters in Mexico and elsewhere, are deposits of sulphur, but the most important mines of sulphur so far discovered appear to be in Chile. Bolivia seems nature's favorite tin depository; but Mexico, Peru, and Chile, as well as Bolivia, have been well supplied with copper ore, and iron in large amounts has been discovered in Brazil and Mexico. Venezuela is unique in having the only important Latin-American deposits of asphalt, a mineral that has only of late become valuable economically. On the other hand, petroleum, the most recently discovered of the important baser minerals, has during the past quarter of a century been found in abundance in Mexico and in virtually all the countries of northern South America.

In the precious metals Latin America is rich. Platinum in considerable amounts has been found in Colombia; Peru, Bolivia, and Mexico (especially Mexico) are well endowed with silver ore; and Colombia, Mexico, and Peru are richly gifted with gold. Important gold deposits have also been discovered in Brazil.

In Brazil and Mexico occur crystallized quartz and other valuable stones—flint, agate, onyx, jade, and turquoise; Mexico also is famous for its abundance of tourmalines, garnets, and opals; emeralds have long been found in Venezuela and Colombia; but Brazil is the only country of Latin America known to produce diamonds, great fortunes of which have been taken out of the southern part of the country, where have also been found carbonadoes, or "black diamonds," used for making the drills necessary for shaping the precious white diamond.

In Latin America are great climatic extremes. This must be true of a region extending from within about ten degrees of the antarctic circle, through the tropics, and well up into the north temperate zone, and having large areas raised more than two miles above the level of the neighboring ocean. In determining climate altitude plays a more important part in Latin America than latitude. An elevation of about three hundred and thirty feet causes a variation of one degree Fahrenheit in temperature. It has been pointed out that if one were to follow the equatorial line from sea level up into the mountains to a height of one mile, he would find there a temperature and vegetation about the same as that in lowland regions fifteen hundred miles to the north or south of the equator, and ascent of a second mile would bring him to an altitudinal zone corresponding to the latitudinal zone twenty-five hundred miles to the north or south. Thus altitude tends to counteract the effect of latitude. On the highest plateaus directly under the equator there is usually an uncomfortable chill in the air. In Mexico City, seventy-five hundred feet above the Pacific, and in Guatemala City, five thousand feet above it, the temperature during most of the year resembles that of early spring in southern California. At these elevations flowers of the temperate zones attain to unusual size and beauty. Yet both these cities lie well within the tropics. It should be noted also that the elevated areas are not only cooler but drier than the lower tropical sections, which, where the rainfall is great, literally steam with moisture.

Currents in ocean and air also contribute toward Latin-American climatic contrasts. The Humboldt Current, which flows from Antarctic waters northward along the Pacific side of South America, has a striking effect upon the adjoining land. Because of the winds cooled by this ocean stream, Lima, Peru, has an average summer's temperature many degrees lower than that of Bahia, situated in practically the same latitude on the Atlantic coast but without a similar moderating influence. The most important winds are the trades. These blow across the Atlantic from the northeast and southeast toward the equator, bearing with them a heavy load of moisture, most of which they are forced to deposit as rain by the time they reach the crests of the Cordillera. Hence in the tropical interior of South America, on the whole, there is excessive rainfall, the surplus from which goes to feed mighty rivers that wind their slow way through the great interior plains to the eastern ocean. The northeast trades also give plentiful water supply to the northern slopes of the Greater Antilles and the eastern coasts of the American isthmus, within the tropics. In parts of the torrid zone also moisture-laden winds blowing from the west give adequate, and in some cases overmuch, rainfall to the western slopes of the mountains on the mainland. This is true of Ecuador and Colombia. But to the south of Guayaquil for a distance of about three thousand miles the Pacific slope of South America is an almost totally rainless region owing to the fact that the mountains are so high here as to cause the trade winds from the Atlantic to give up all their moisture on the eastern side of the watershed, and that the winds which blow from the Pacific in this belt are for the most part dry. A little to the north of Valparaiso, however, begin moisture-bearing west winds, which give an adequate supply of rain to central Chile and an abundance to the southern part of the country. But on the Argentine side of the mountains in these latitudes there is dearth of rainfall for some distance, especially at the north, because the high eastern ranges of the Andes force the winds from the Pacific (which are the prevailing winds) to give up their moisture.

The physiographic and climatic conditions that have been described are the chief determinants of the character and distribution of the lakes and rivers of Latin America. In comparison with Anglo-America the lakes are few and small. Here and there in the mountains, at times occupying the craters of extinct volcanoes or filling pockets in snow-crested ranges, are lakelets—some of them, such as the Lake of the Inca in the southern Andes, exquisitely beautiful, and valuable primarily because of this fact. Formerly there were extensive shallow lakes in the broad valley of Mexico; but some of these have been much shrunken through deliberate drainage, leaving reed-grown marshes in parts of their original sites. Maracaibo, a large body of water emptying into the Gulf of Venezuela, is called a lake but more resembles a bay. In Central America, however, are two genuine lakes of considerable importance, Managua and Nicaragua, both of them oblong in shape and of considerable depth. The former is about thirty miles long; the latter, about a hundred, with a maximum width of forty-five. The outlet of Nicaragua, the San Juan River, is small but potentially very important; for it and the two lakes form the basic parts of a prospective interoceanic canal route which has been the subject of discussion for four centuries. Titicaca, one of the most remarkable lakes in the world, lies between Peru and Bolivia upon the vast plateau of South America, more than twelve thousand six hundred feet above the shores of the Pacific. In one place the lake is nearly nine hundred feet deep. Its greatest length is a hundred and thirty-eight miles, its width sixty-nine miles, and the total water area is a little less than two thousand square miles. In past ages the depression in the great plateau was occupied by an inland sea which connected with the ocean to the east by what is now a deep gorge. Titicaca, the vestige of this sea, forms the drainage reservoir of the central plateau, but has no surface outlet.

In the northern and western parts of Latin America are no rivers sufficiently long or copious to be important for navigation, but there are many of inestimable value for irrigation. The rainless area on the Pacific coast of South America is prevented from being an unbroken strip of desert by the short, swift seasonal streams flowing from the melting snows of the high Andes. Similarly, somewhat less arid regions of Mexico are made fertile by the existence of occasional rivers; but the largest streams in the arid northwestern section are the Río Grande, which for the lower part of its course forms the frontier between Mexico and the United States, and the Colorado, which lies largely in the United States but passes for some miles through the territory of Mexico to its outlet in the Gulf of California.

On the other hand, the part of South America that drains away from the Pacific possesses many large rivers, some of them gigantic. To the south of Buenos Aires are a series of streams flowing into the Atlantic, of which the Río Negro and the Colorado are the most important. The San Francisco, which helps to drain the eastern plateau, is the largest of numerous Brazilian streams flowing into the Atlantic to the south of the Amazon. But the three rivers that have been mentioned are small in comparison with a number of others. The Magdalena in Colombia, which flows north into the Caribbean, is about a thousand miles long and, with its branches, drains a territory of perhaps a hundred thousand square miles. The Orinoco River system of Venezuela has a drainage basin more than three and a half times as great. Into the South Atlantic the Plata River, which is really but an estuary, pours out more water than is carried by any stream of North America. It is formed by the

Uruguay and the Paraná. The former is a simple stream, but the latter has a number of important tributaries (the leading one being the Paraguay) which give the Paraná system a total of about two thousand miles of water navigable for large vessels. The Amazon, however, dominates South America and is the largest river in the world. It empties into the ocean four or five times as much water annually as the Mississippi, and with its tributaries it supplies an aggregate of about twenty-five thousand miles of navigable water. Its drainage basin has an area of nearly three million square miles.

Here and there in the South American rivers are large rapids and waterfalls obstructive to navigation, but they enrich the beauty of the landscape and offer great potential power for industrial enterprises. Probably the most copious of the great falls is the Guayra on the upper Paraná; but the Iguassú Falls on the Iguassú branch of the Paraná are much higher and are the most impressive and magnificent cataracts known to exist in the Western Hemisphere.

It is impossible here to do more than sketch in bold outline the facts connected with the native Latin-American flora, for the vegetation of these southern lands displays infinite variety and holds many secrets not yet acquired even by botanists. In the warm, comparatively rainless regions—such as the northwestern parts of Mexico and Argentina, the Pacific strip of South America, and a portion of the eastern extremity of Brazil—the scant vegetation resembles, on the whole, that of the arid sections of the southwestern United States. The characteristic touch is usually given by cacti, especially the organ cactus and the nopal (or prickly pear), and the agaves, the most common representatives of which are the maguey, the henequen, and the ixtle, all fiber-producing plants with long swordlike leaves.

Parts of the treeless plains or *llanos*, of the Orinoco basin, are covered with tall thick grass; similar prairie lands exist in the extreme southern part of Brazil; and in central Argentina are still found vast, level, monotonous stretches of natural pasture land called *pampas*. Only here and there in this part of the Argentine is relief given by the sight of a solitary *ombú* tree, which at a distance resembles a large oak; it is valuable for its shade, but, being soft and spongy, is of no use commercially. In the cooler altitudes and latitudes grow many species of trees closely akin to those found in the United States,—such as beeches, oaks, willows, laurels, pines, cedars, and cypresses. On the plateau of Mexico still survive scattered specimens of the gigantic *ahuehuete*, a variety of cypress, one of which, in the present state of Oaxaca, is a hundred and sixty feet round the trunk four feet from the ground and about the same number of feet high. In the south temperate zone, especially in Brazil and Chile, grows the araucaria pine, which often reaches a height of more than a hundred feet. These trees, their straight, bare trunks topped with horizontal branches ending in skyward-pointing tufts of dark-green foliage, suggest gigantic candelabra, especially when they are seen in silhouette against the sky. In some of the cooler uplands of Latin America are also found the wild prototypes of plants now grown for ornamental purposes north of the Rio Grande. Such are the pepper tree (indigenous to Peru) and the shrub called in the United States the poinsettia because it was introduced there from its native Mexico by Joel Poinsett.

In much of the low-lying territory of the torrid zone are dense tropical growths of shrubs and trees—many of them hosts to orchids and other parasites—matted and woven together by lianas and other creeping, strangling vines. Here are found hundreds of species, and often scores and even hundreds of varieties, of trees and shrubs alone. In most of the tropical and subtropical forests, however, certain growths are especially conspicuous. Clumps of feathery bamboo and palms crop out here and there, mingling with rosewood, ebony, mahogany, quebracho, and brilliantly blooming bignonias; but the monarch of the jungle is usually the silk cotton, of the genus *Ceiba*, the straight, silvery trunk of which often rises to a height of more than a hundred feet before being topped by its picturesque umbrella of dark foliage.

The lands to the south and east of the Rio Grande have given to the world more useful native vegetable products than any other equal area. They have provided such food plants as white and sweet potatoes, certain yams, tomatoes, red peppers, cassava, beans, quinoa (a species of pigweed the seeds of which are used for porridge), maize, or Indian corn (the most valuable of all), vanilla, Brazil nuts, peanuts; melons of various kinds; numerous tropical and subtropical fruits, including the pineapple, the avocado, the mamey, the nispero, the guava, the sour sop, the sweet sop, and the sapodilla, or custard apple; beverage plants, such as the cacao and the mate; scores of medicinal herbs of primary importance, such as cinchona (which yields quinine), coca (from which comes cocaine), ipecac, sarsaparilla, cascara, tobacco; fiber plants, such as the most important species of cotton and various members of the agave family; the tagua palm, which produces vegetable ivory; plants and trees yielding rubber, gums, resins, and oils; the toquilla palm, the leaves of which furnish the "straw" for Panama hats; logwood, fustic, and other dyewoods; quebracho for tanning, and also vast quantities of timber for cabinet purposes and other, coarser uses.

Latin America abounds in a great variety of animal life, especially genera of pre-mammalian development. Fresh and salt water, especially in the tropics, teem with fish, of which about two thousand species, many of them edible, are found in the Amazon and its tributaries alone. In the waters of the Gulf of Mexico and the Caribbean, particularly, mollusks and crustaceans are abundant, the most interesting and important mollusk being the pearl-bearing oyster. The reptiles include horned toads, alligators, turtles, and tortoises, some of them gigantic in size, and many species of lizards and snakes. Some of the latter, such as the boa constrictor and the rattlesnake, are harmful to man. Insect life and bird life are perhaps more abundant and varied in Latin America than anywhere else in the world. Ticks, ants, and mosquitoes of many species abound, and similar pests to man, but there are also many kinds of beautiful moths and butterflies about which even entomologists know little. A scientist who recently studied the environs of Pará, Brazil, estimated that about seven hundred species of butterflies were to be found in that region alone, whereas the whole of Europe contains only three hundred and twenty-one species. It has likewise been estimated that the present republic of Brazil has representatives of about one sixth of the species of birds in the world. In the torrid zone there is considerable range in size from the tiny, jewel-like humming bird, of which Brazil alone has fifty-nine well-known species, to the condor, the largest flying bird, found in the heights of the Andes. Gorgeous feathers are the rule. Especially interesting among the brilliantly plumaged birds is the quetzal, the most beautiful member of the trogon family. It has a body about as large as a pigeon's, and is a graceful, magnificent creature, clad (except for its bright-red breast) in shining green from the top of its elaborate crest to the end of its sweeping tail feathers, two or three feet in length. The quetzal lives in the elevated parts of southern Mexico and Guatemala, and does not survive captivity. Hence it appears upon the national seal of Guatemala as the emblem of liberty. The water birds of Latin America include ducks and geese, pelicans, cranes, flamingoes, egrets, and other members of the heron family. The turkey, of iridescent bronze color, is a native of Mexico. In southern Brazil and in the plains of the Plata region and southern Argentina is found the rhea, or American ostrich, which is much smaller than its Oriental kin.

There are comparatively few species of native mammals. The most common aquatic ones are seals, manatees, and whales. Among the most widely distributed land mammals are pumas, jaguars, foxes, wolves, and tapirs. Different species of deer inhabit the tropical table-lands and large areas of the temperate zones. More important among the ruminants, however, is the group allied to the camel: the guanaco, which ranges from Peru to Cape Horn; the vicuña, a smaller and more delicately formed animal, found in the Andean highlands; and the alpaca and llama, which have the same general range as the vicuña, but were domesticated by the American aborigines perhaps thousands of years ago. The only member of the bovine genus found in Latin America in pre-Spanish times was the bison, which, however, scarcely ranged south of the Rio Grande and probably played no part in the lives of the Mexican aborigines. Though the fossils show that the primordial ancestor of the equine family existed at one time in the New World, neither the horse nor any of its relatives were found there until introduced by the Spaniards. The dog, however, that humble friend of man, was represented in pre-Spanish America by a number of domesticated species.

In the long run geographic environment plays the leading part in shaping human history, and its influence seems unusually conspicuous in Latin America. Hence it is well to consider here the effect of some of the geographical facts stated above upon the human inhabitants of the region. In the first place, it is desirable to note that the isolated position of the Americas deprived the early inhabitants of stimulating cultural contact with their Asiatic cradleland. For about three hundred years after Columbus's discovery the region enjoyed through colonial ties a fairly close contact with Europe; but after the Latin-American wars for independence had been won, South America, for the reason that it is off the world highroad, which runs east and west, again suffered from isolation and became the "neglected continent." The fact that the coast line is smooth and curving rather than like that of Europe, broken into jagged edges by numerous deep and safe harbors and inviting peninsulas, has perhaps played an equally important part, for it made ocean contact between the different parts difficult. A territory sufficiently broken up to produce differentiation in culture, and yet not so extensive and rugged as to make stimulating contact between the physiographic units impossible, contributes much toward progress; Europe offers the best illustration of this. But in continental Latin America as a whole, though very marked physiographic units exist, they are in some instances imperial in extent and are usually so set off by mountain walls, deserts, or dense jungles as to have exerted and received, during the period of aboriginal dominance, little of the educational effect coming from exchange of ideas. Even in this mechanical era the natural obstacles referred to have made railroad-building in Latin America much more difficult, as well as more expensive, than in the United States—a fact which has retarded national development.

The rank growth of vegetation in the hot, rainy tropical lowlands is an additional handicap to human beings who inhabit this region. To clear the ground and to keep down the weeds, as is done in the temperate zones, is virtually an impossibility. The jungle tends to hold its own. This is apparent from the fact that today, more than four hundred years after the European colonization of Latin America began, the Amazon basin still contains the largest area of virgin forest on earth, and its thinly scattered inhabitants are chiefly wild Indians. On the other hand, the greatest river basin of North America, the Mississippi Valley, was transformed in less than three centuries into a region of neat farms and flourishing towns; but that valley lies wholly within the north temperate zone.

The existence in Latin America of an unusually large number of useful plants was of marked advantage to the inhabitants both during the aboriginal period and subsequently; but the benefits gained from nature's partiality in this regard were perhaps more than outweighed by the lack of large animals capable of being used for draft, a lack which unquestionably had a restraining effect upon progress.

Climate, however, has been far more influential upon the history of Latin America than any other part of physiography. "It is not by accident," says Ellsworth Huntington,[1] "that the most universal subject of conversation is the weather." Anglo-America's chief natural advantage is its situation largely within a temperate zone, where it is visited by stimulating seasonal changes. The most insuperable handicap of Latin America is that most of its area lies within the tropics, a region of climatic monotony encouraging listlessness and lack of ambition, which are also fostered by nature's generosity, especially in the matter of food supply. Even the cool, high table-lands within the tropics, where exertion is required to make a living, are far inferior as a residence for man to the lower levels of the temperate zones, for here too the temperature is monotonous and the rareness of the atmosphere tends to reduce physical and mental energy and ambition. Furthermore, the thin air of the highlands, the heat and humidity of the lowlands, and the glare of the light throughout the tropics contribute to nervousness and lack of self-control. In comparison with the temperate zones, in these regions human actions are likely to be dominated more by emotion and less by reason.

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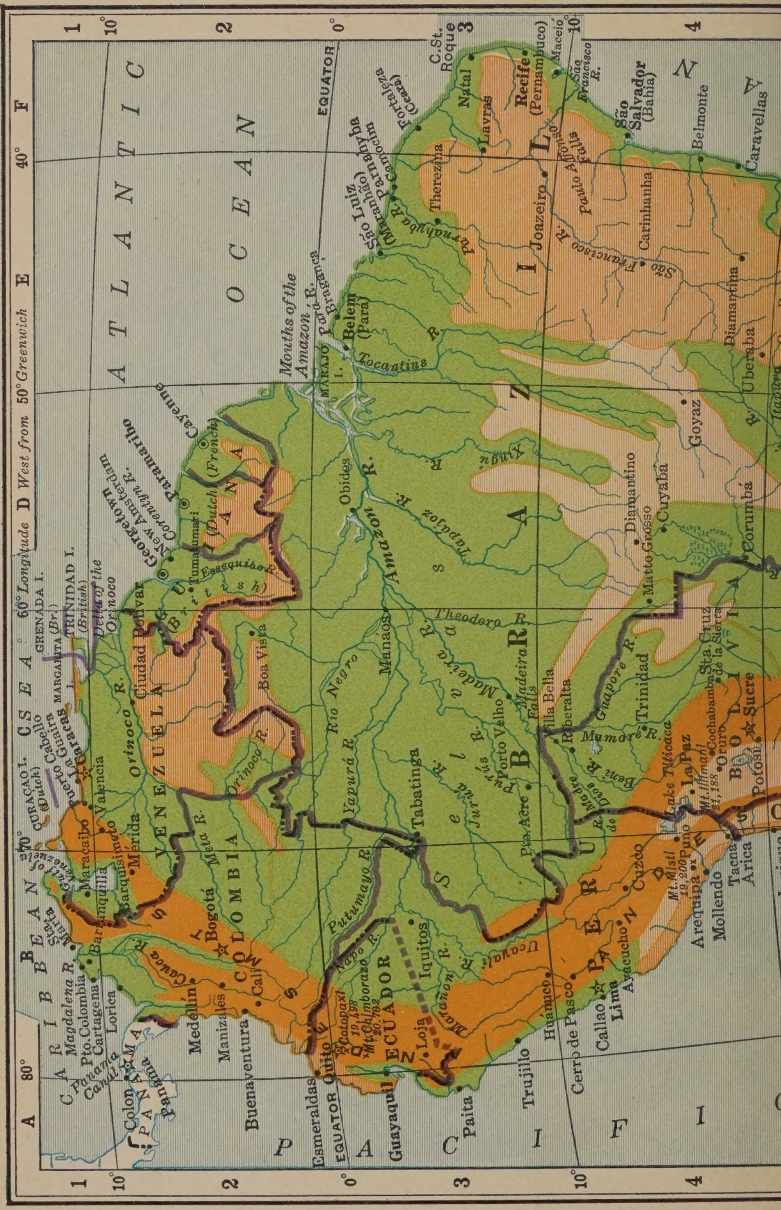
[1] "Changes of Climate and History," *American Historical Review*, Vol. XVIII, p. 213.

Tropical and subtropical regions are especially infested with diseases unfriendly to man. Some of the worst of these are caused by animal parasites. Two of the most widespread maladies found in Latin America are malaria and hookworm, the first of which is carried by the mosquito, and the latter directly caused by an intestinal worm. Though these afflictions do not usually kill outright, they rob their victims of physical, mental, and moral energy. Yaws, apparently introduced from Africa, flourishes in the West Indies. Yellow fever, also carried by the mosquito, was until a few years ago endemic in many coastal areas of tropical and subtropical America, where it took a heavy annual toll of lives. Throughout the torrid zone various other fevers occur, very frequently due to animal parasites. The inhabitants of this belt must constantly be on their guard also against the poisonous bites and stings of reptiles and insects.

Recent medical discoveries have made great headway against many of the diseases which have handicapped Latin America, and there is reason to believe that most of them will be eliminated or much restricted in the area of their occurrence; but at present there seems no likelihood that the direct ill results of tropical climate upon man can ever be seriously lessened.

Despite the many handicaps characterizing the tropics, in pre-Columbian times the majority of the aborigines in what is now Latin America lived within the torrid zone, upon the high plateaus lying between the tropics, for these isolated regions offered protection. Here agriculture advanced, arts and crafts displayed new skill, and commerce flourished; and in these remote heights the peoples built towns and cities which became centers of religious worship and of far-reaching trade. In these highlands the Spaniards of the colonial era, seeking security from their enemies, likewise established themselves; six of their capitals were built five thousand feet or more above sea level. And today the great majority of the Latin-American people are to be found in these cool, lofty, and mountainous regions of the torrid zone or in its even less wholesome soggy valleys and coastal plains.

Yet the south temperate zone is unquestionably the part of Latin America most favorable to human advancement, and there will the most progressive peoples now be found. Uruguay lies wholly within this belt; nearly all of Argentina and most of Chile are found there also, and a long stretch of southern Brazil.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50° Greenwich
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C A R I B B E A N S E A
A T L A N T I C O C E A N
P A C I F I C
EQUATOR
CURAÇAO I. (Dutch)
GRENADA I.
MARGARITA I. (Br.)
TRINIDAD I. (British)
Delta of the Orinoco
Puerto Cabello
La Guaira
Caracas
Valencia
Maracaibo
Gulf of Venezuela
Barquisimeto
Merida
Sta. Marta
Barranquilla
Magdalena R.
Pto. Colombia
Cartagena
Lorica
Panama Canal
Colon
PANAMA
Panama
Medellin
Manizales
Cauca R.
Bogotá
Cali
Buenaventura
Esmeraldas
Quito
Cotopaxi 19,498
Mt. Chimborazo 20,702
Guayaquil
ECUADOR
Loja
Paita
Napo R.
Iquitos
Marañon R.
Ucayali R.
Putumayo R.
Yapurá R.
Tabatinga
VENEZUELA
COLOMBIA
Meta R.
Orinoco R.
Ciudad Bolivar
Boa Vista
Georgetown
New Amsterdam
Corentyn R.
Paramaribo
Cayenne
GUIANA
(British)
(Dutch)
(French)
Tumatumari
Essequibo R.
Mouths of the Amazon
MARAJO I.
Pará R.
Bragança
Belem (Pará)
Tocantins R.
São Luiz (Maranhão)
Parnahyba
Camocim
Fortaleza (Ceará)
C. St. Roque
Natal
Lavras
Recife (Pernambuco)
Maceió
São Francisco R.
Paulo Affonso Falls
Salvador (Bahia)
Belmonte
Caravellas
Therezina
Parnahyba R.
Joazeiro
São Francisco R.
Carinhanha
Diamantina
Uberaba
Goyaz
Obidos
Amazon R.
Xingu R.
Tapajoz R.
Manaos
Rio Negro
Theodoro R.
Madeira R.
Madeira Falls
Porto Velho
Purús R.
Juruá R.
Pto. Acre
Villa Bella
Riberalta
Madre de Dios R.
Beni R.
Mamoré R.
Guaporé R.
Trinidad
Diamantino
Matto Grosso
Cuyaba
Corumba
Sta. Cruz de la Sierra
Cochabamba
Oruro
Sucre
Potosi
La Paz
Mt. Illimani 21,188
Lake Titicaca
BOLIVIA
BRAZIL
PERU
Trujillo
Huánuco
Cerro de Pasco
Callao
Lima
Ayacucho
Cuzco
Arequipa
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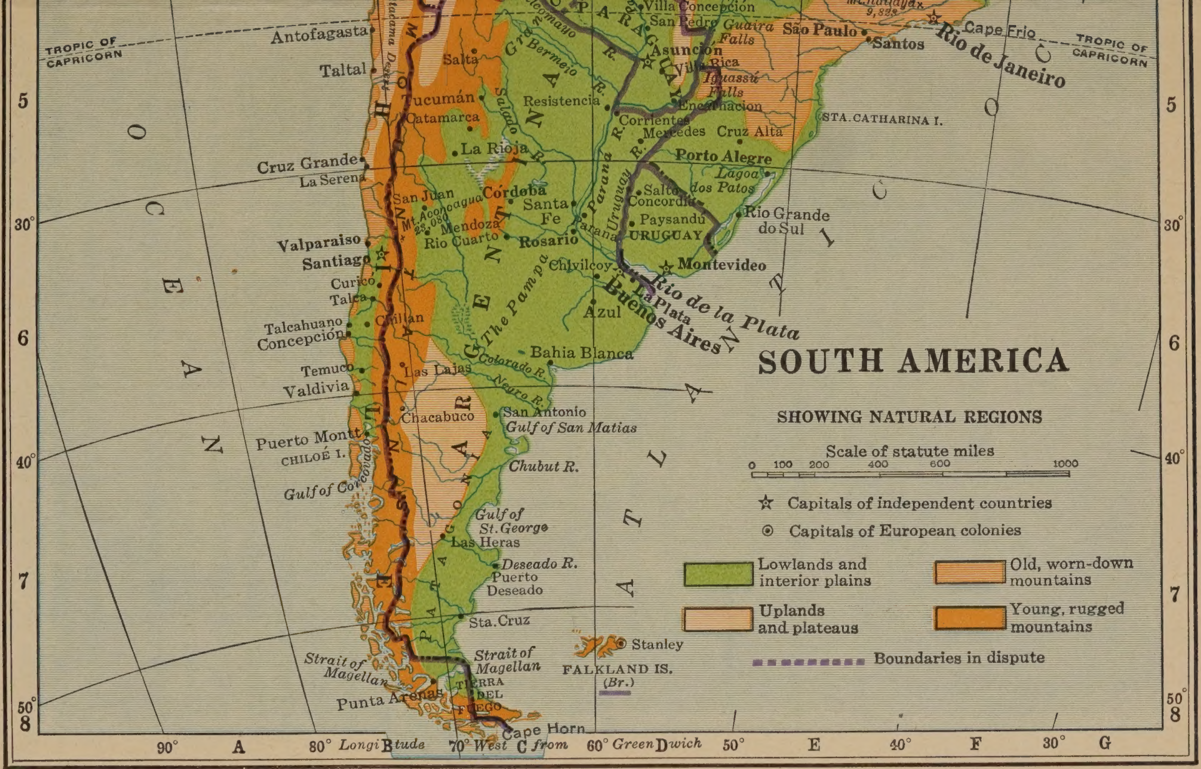
Tacna
Arica


SOUTH AMERICA
SHOWING NATURAL REGIONS
Scale of statute miles
0 100 200 400 600 1000
☆ Capitals of independent countries
⊙ Capitals of European colonies
🟩 Lowlands and interior plains
▨ Uplands and plateaus
▨ Old, worn-down mountains
▨ Young, rugged mountains
Boundaries in dispute
TROPIC OF CAPRICORN
Antofagasta
Taltal
Atacama Desert
Salta
Tucumán
Catamarca
La Rioja
Cruz Grande
La Serena
San Juan
Mt. Aconcagua 23,080
Mendoza
Rio Cuarto
Córdoba
Santa Fe
Rosario
Paraná
Valparaiso
Santiago
Curico
Talca
Chillan
Talcahuano
Concepción
Temuco
Valdivia
Las Lajas
Chacabuco
Puerto Montt
CHILOÉ I.
Gulf of Corcovado
Gulf of St. George
Las Heras
Deseado R.
Puerto Deseado
Sta. Cruz
Strait of Magellan
Punta Arenas
TIERRA DEL FUEGO
Cape Horn
FALKLAND IS. (Br.)
Stanley
San Antonio
Gulf of San Matias
Chubut R.
Negro R.
Colorado R.
Bahia Blanca
Azul
Chivilcoy
La Plata
Buenos Aires
Rio de la Plata
Montevideo
URUGUAY
Paysandu
Concordia
Salto
Uruguay R.
Paraná R.
Rio Grande do Sul
Lagoa dos Patos
Porto Alegre
Cruz Alta
Mercedes
Corrientes
Resistencia
Encarnacion
Iguassú Falls
Villa Rica
Asuncion
PARAGUAY
San Pedro
Villa Concepción
Guaira Falls
São Paulo
Santos
Rio de Janeiro
Cape Frio
STA. CATHARINA I.
Salado
Bermejo R.
Pilcomayo
The Pampa
ARGENTINA
CHILE
PATAGONIA
OCEAN
ATLANTIC OCEAN
5
30°
6
40°
7
50°
8
90°
A
80° Longitude
B
70° West
C
from
60° Greenwich
D
50°
E
40°
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30°
G

II

THE ABORIGINAL AMERICANS

World wrongly called the new! This clime was old
When first the Spaniard came, in search of gold.
Age after age its shadowy wings had spread,
And man was born, and gathered to the dead;
Cities arose, ruled, dwindled to decay,
Empires were formed, then darkly swept away:
Race followed race, like cloud-shades o'er the field,
The stranger still to strangers doomed to yield.

Author unknown

WHENCE came the American aborigines is a question not yet answered to the satisfaction of all scholars; but it is generally agreed that their ancestors were immigrants from Asia, possibly, even probably, supplemented by occasional small groups of arrivals from Europe.

The fact that the North American continent at its extreme western point almost touches Asia suggests that in this quarter was found the main prehistoric doorway between the two hemispheres. Bering Strait is less than sixty miles wide, and halfway across it are the Diomede Islands, which probably served as stepping stones for the immigrants who arrived by water. A. L. Kroeber, the anthropologist, thinks, however, that most of the pioneer inhabitants of the Western Hemisphere came over the ice, which, during the period of greatest migration, probably formed a bridge across the narrow strait; for the first adventurers into the Western World arrived at least twelve thousand years ago, when the earth was so much nearer the peak of the last great ice age.

It is probable that an Asiatic hunter or fisherman, lost or storm-driven, first sighted the coasts beyond the strait. The report of his discovery would naturally have led to exploring expeditions; and it is possible that for a time occasional journeys were made in both directions between the two continents. But some sort of compulsion must have been necessary to send any considerable number of people up into northeastern Asia, across the chilly bridge, and far enough within the bleak wilderness of what is now Alaska to start a permanent population of the North American continent. This stimulus may have come from pressure by fiercer and more powerful tribes, much as the Huns under Attila forced the Goths into the Roman Empire. Thus many waves of population may have crossed the strait.

Large, formidable wild animals were few in North America, and the climate became more attractive to these pioneering immigrants as they moved southward. There also may have been occasional pressure from the rear due to other invading groups. Hence the advance toward the south and east was probably fairly constant and rapid. Within a short time, perhaps five or six centuries, the descendants of the first immigrants over Bering Strait had reached the Isthmus connecting the two continents. Here in the tropics, though food was more abundant, the natural obstacles to travel were greater. This doubtless retarded the wanderers, especially in the narrow parts of the Isthmus; but in time the jungles of Panama were traversed and the southern continent invaded. By the end of perhaps two thousand years after the exodus began over what is now Bering Strait, the earlier waves of humanity had swept across the torrid zone and penetrated as far into the south temperate as the bleak and chilly islands, later known as Tierra del Fuego, at the extreme end of the continent.

The first immigrants into the present Americas belonged to a generalized Mongolian type, perhaps more closely resembling the American Indian than they did the Chinese of today. When they made the crossing they had apparently reached the upper old stone age of culture or the lower new stone age. They lived entirely upon wild food, chiefly the flesh of animals, whose skins served them as garments. Though they had probably learned to weave rude baskets, they had no knowledge of pottery-making. Their most prized possessions were the bows and arrows, spears and harpoons, with which they secured their food and killed their enemies. By means of the primitive drill they perhaps kindled their fires. Later comers may have brought a knowledge of other accomplishments, but their contributions cannot have been great. Whatever cultures the American aborigines possessed when the white Europeans arrived were such as they had largely, if not entirely, worked out for themselves from their primitive Asiatic heritage. Even after the lapse of more than ten thousand years the American aborigines have certain physical characteristics virtually identical with those of their present Asiatic kindred—skins ranging from tan to dark brown; coarse, straight black hair and scanty beards; broad faces and high cheek bones; soft, receding chins; large, loose mouths; protruding, shovel-like teeth; and small, dark eyes, often oblique in appearance. But they also show certain characteristics of their own, notably retreating foreheads, strongly developed, often aquiline, noses, and prominent superciliary arches. Whether these characteristics were developed in the new environment or were primordial features preserved by it and lost by the related Asiatics is not apparent, but perhaps the former was the case. Differentiation is likewise apparent between various groups of the Western Hemisphere. In parts of southern Mexico, for instance, oval faces are often seen, particularly among the women, and also soft hair, at times wavy. There are likewise marked contrasts in height, the people living on the open plains usually being taller than those from the highlands. But occasionally an unfriendly climate stunts growth in flat open spaces, as in the case of the Yahgans of Tierra del Fuego, who are but little over five feet tall. Their Patagonian neighbors a short distance to the north average nearly six feet and are among the most gigantic of human beings.

In the absence of a written phonetic language the breaking of connection with the Old World and the separatism caused by physical barriers in the New resulted in great linguistic differentiation and the development of numerous language families; but very little is yet known about the aboriginal tongues and their relationships.

Varied environment in the New World likewise produced marked divergence in manners, customs, and rate of advancement. In consequence scholars have been able to classify the aboriginal population roughly into culture areas which are of aid to the general student. For Latin America the following divisions are the most important: (1) From the tropic of Cancer in northern Mexico to Nicaragua, the area of the Nahua-speaking peoples; (2) eastern Central America, western Colombia, and northwestern Ecuador, where the Chibchas were dominant; (3) the Andean strip, extending from southern Ecuador to northern Chile, on which the Quechuas of Peru set their cultural stamp; (4) the forested parts of southern Chile and the open plains of Argentina, characterized by the Araucanian-Patagonian culture; (5) Tierra del Fuego and the north coast of the Strait of Magellan, the range of the Fuegian and related types; (6) the forested portions of northeastern South America, including most of the Plata basin, where two apparently related cultures, the Guaraní and the Tupi, are especially conspicuous; (7) the West Indian Islands and perhaps a section of the Venezuelan coast, where the Caribs and Arawaks were found by the early Spaniards.[1]

Perhaps because of less favorable environment, the last four groups listed had, when modern contact with Europe began, made much less advancement than the others, and they also contained fewer individuals. They lived in shelters of various types made of skins, palm leaves, branches of trees, and other similar perishable materials; in the tropics they commonly wore no clothes, and in colder regions clad themselves in the skins of wild animals; their social organizations ranged from the mere family group, found among some subdivisions of the Fuegians, to the tribe formed from an aggregation of family groups led by a chief; their ideas of the immaterial were at the lowest a tangle of superstitions, and at the best a primitive form of nature worship; they had no scientific knowledge and no real literature, and their best artistic efforts were very crude. Certain of the groups had developed some outstanding cultural characteristics. The inhabitants of the forested islands of southern Chile, for instance, had learned to make substantial canoes of planks. On the open plains of the south temperate zone hunters had invented the *bolas*, a lasso made from two or three united thongs with weights at the end of each. Whereas most of the backward aborigines were entirely dependent upon wild food, the groups in the Antilles and on part of the adjoining mainland carried on a primitive agriculture, as did also the Araucanians to the west of the Andes. But they had probably learned to do so from their more advanced neighbors, to whom they were likewise indebted for seeds of maize, beans, squashes, and other domesticated plants.

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[1] The classification set forth above is based upon the groupings made by A. L. Kroeber (*Anthropology*, pp. 336–338) and Otis Tufton Mason ("America: Ethnology and Archæology," in Encyclopædia Britannica, twelfth edition).

THE MAYAS

Remarkable cultural achievement was made by various native peoples of Middle America (southern North America and northern South America), but the Mayas are generally conceded to have been the earliest to make marked advancement and to have set standards of material and intellectual progress which were never equaled by other aboriginal groups. The cradleland of their peculiar culture was the region between the Isthmus of Tehuantepec and the eastern part of the present state of Honduras. But the Mayas did not belong to the Nahua peoples. Coming from the northwest possibly a thousand years before the birth of Jesus of Nazareth, the Mayas entered the region and found it inhabited by a sedentary agricultural people less advanced than themselves. These they conquered and enslaved, and proceeded to erect stately cities where before had been but modest villages.[1] By the seventh century of the Christian Era, Copán, Quirigua, and Palenque in the southeast, Cobā, Chichen Itza, and Tulum in the northernmost part of the peninsula of

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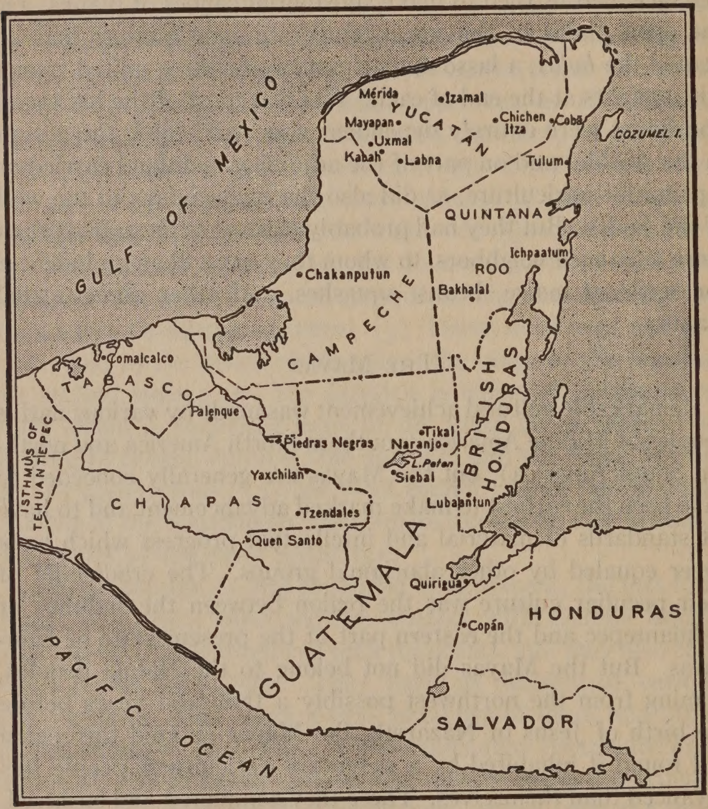
[1] The remains of many scores of such cities, usually overgrown and obscured by jungle, have been found, and frequent new discoveries are being reported; for the Maya country is at present the scene of a great archæological activity which is resulting in the establishment of new facts regarding the Mayas and making necessary the revision of some previously accepted views.

Yucatán, and many intervening cities had been built, and some of them were already centuries old. In this period, known to archæologists as the Old Empire of the Mayas, the section of


GULF OF MEXICO
Mérida
Izamal
YUCATÁN
Mayapan
Chichen Itza
Coba
COZUMEL I.
Uxmal
Kabah
Labna
Tulum
QUINTANA ROO
Ichpaatum
Chakanputun
Bakhalal
CAMPECHE
Comalcalco
TABASCO
Palenque
ISTHMUS OF TEHUANTEPEC
Piedras Negras
Tikal
Naranjo
L. Peten
Siebal
BRITISH HONDURAS
Yaxchilan
CHIAPAS
Tzendales
Lubaantun
Quen Santo
GUATEMALA
Quirigua
HONDURAS
Copán
SALVADOR
PACIFIC OCEAN

THE MAYA COUNTRY, SHOWING IMPORTANT RUINS

Based on map in H. J. Spinden, *A Study of Mayan Art*

greatest general progress appears to have been the southeast, where cultural blooming reached its height between about 400 and 600 A.D. Shortly after the latter date Copán, Quirigua, Palenque, and other great southern centers of material and intellectual development were abandoned by their thinking, ruling classes, who moved north, apparently leaving to the humbler inhabitants the monumental cities which had risen and bloomed through the efforts of themselves and their talented forbears.[1]

Some time after this migration the period of the New Empire began. Many additional cities, such as Uxmal, Labna, and Mayapan, were built in the peninsula of Yucatán, and those already existing took on increased life owing to the stimulus given by the newcomers from the south. But the Mayan cities, like those of ancient Greece, were given to quarreling among themselves—a fact which toward the close of the twelfth century encouraged the Toltecs, a people from the northwest, to invade the country over the Isthmus of Tehuantepec. One of the warring cities seems even to have invited them into the peninsula through asking military aid of them. The Toltecs soon became conquerors; and three cities at least, Chichen Itza, Uxmal, and Mayapan, fell into their hands. The overthrow of Chichen Itza was brought about by the most remarkable personality of Yucatán's Toltecan period, and, indeed, of Toltecan history—Quetzalcoatl, known among the Mayas as Kukulcan, both names having the same meaning, "Feathered Serpent." This prince, priest, warrior, and scientist, after having conquered Chichen Itza, rebuilt it along Toltecan lines and made it the Mecca of the faithful and the most honored city of the peninsula.

For perhaps two centuries after the Toltecs invaded Yucatán it was fairly prosperous and remarkably populous. Upon the flat limestone plain in the northern part of the peninsula were scores of closely placed cities and towns. But quarrels appear to have become almost habitual, and they finally ended in the complete destruction of Mayapan about the year 1450. A little before this, however, decline began; and a number of the northern cities were again deserted, the inhabitants turning to the south, some of them to settle in and about Lake Peten, where they were conquered by the Spaniards in the late seventeenth century. Long after the whites arrived, however, some of the northern cities, especially those toward the eastern part of the peninsula, continued to be occupied, though by a decadent population.

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[1] The cause of this extraordinary exodus is not known, but various theories have been advanced to explain it: the need for more agricultural land due to the growth of population; increased rainfall, making more difficult the struggle to keep down tropical vegetation; the spread and persistence of yellow fever; the influence of the priestly class acting under some unknown religious motive. Probably the explanation is to be found in a combination of the foregoing. The coming of hardships or calamities may have convinced the ecclesiastics that the region had met with disfavor from the gods and decided them to lead their people north to more desirable lands made known through the reports of travelers and traders.

During the height of the Mayas' power and prosperity their land was crisscrossed by many trails and roads connecting the villages and towns. Perhaps the best of such roads was that built after the Toltecan conquest to connect Chichen Itza and Cobā. It was fifty miles long, about thirty-two feet wide, and from two to eight feet high, according to the configuration of the soil. The sides were of cut stone, and between them was piled the rubble which formed the foundation of the road. The upper surface was slightly rounded to permit it to shed water, and was made smooth by a coating of cement.

Some of the larger cities connected by such roads, or at least their public buildings, were protected by stone walls. At Tulum, along the east coast of Yucatán, are the remains of such a wall, measuring about two thousand three hundred and fifty feet in length, twenty in width, and from ten to fifteen in height. In this case the wall did not completely surround the city, for one side of it was guarded by a cliff overlooking the sea.

Such walls were needed to protect against attacks from neighboring cities; for the only sturdy, stable political unit among the Mayas was the individual city with its outlying territory. Each of these was a theocratic despotism, the ruler of which seems usually to have had the double function of civil prince and high priest. During the Old Empire there existed a loose confederation of these municipal units; later voluntary alliances were formed between cities and occasionally political consolidation took place through conquest. But such unions appear always to have been brief, owing to mutual jealousies and conflicting ambitions such as proved the bane of the Greeks. Like the Greeks, the Mayas failed to develop a broad patriotism welding the whole people into a nation with a strong inclusive government and a sturdy patriotism.

The populations of the Mayan cities, the largest of which perhaps never exceeded thirty or forty thousand, were definitely stratified. The military leaders, nobles, and priests formed the highest class and the slaves the lowest, with merchants, artisans, and farmers in between. The names of some of the proudest of the nobility of the period of Mayan greatness are still borne by their descendants, the humble laborers of present-day Yucatán. Among the slaves—children of a conquered race—existed the least degree of Mayan blood, whereas the highest classes represented the purest Mayan types.

Most of the people dwelt in quadrangular or elliptical huts of one or two rooms, with thatched roofs and walls of bamboo, adobe, or rubble and plaster. The homes of the well-to-do were usually of the same material, constructed on a larger scale; but occasionally they were of substantial stone, like the public buildings, which will be described later. House furnishings even among the wealthy were simple, consisting chiefly of low stools, at times used as seats instead of the floor itself, and reed mats, which were the customary beds.

Even the humblest classes placed much emphasis upon personal cleanliness; this greatly impressed the Spanish bishop Diego de Landa, who in the latter part of the sixteenth century reported that the Mayas "bathed continuously." At least one bath a day was the rule, which seemed excessive to the Spaniards.

In the hot climate of the Isthmian lowlands little clothing was worn, especially by the men, who commonly were clad only in a cotton breechclout; but the men of the upper classes often wore in addition sandals of leather or agave fiber and over their shoulders a tiger skin or a square cotton mantle, the ancestor of the present-day Latin-American *manta* or *poncho*. Among the women the usual style of dress was that still persisting in parts of Yucatán—a gayly embroidered cotton *huipil*, or bag-shaped tunic, worn over a *pic*, or skirt, having an embroidered hem projecting well below the upper garment. The head and shoulders were protected from sun and storm by a colored scarf.

Both sexes at times wore the hair short, cut squarely like the modern "bob"; but it was often left long and elaborately dressed. Much attention was given to personal ornamentation in other ways. Tattooing and painting the skin were customary, and also filing the front teeth into sharp points. The deformation of the skull of highborn infants in the interest of securing a very sloping forehead (considered a mark of beauty) likewise appears to have been rather common. Both sexes wore ear ornaments; but the men (notably those of the upper classes) also had plugs and ornaments in their lips and nostrils, partly to show, by size and type, the rank of the individual. Men of wealth wore upon their necks, arms, and legs heavy jewelry of shells, turquoise, gold, and other metals; and they were more given than the women to elaborate headdresses, those of the highest officials being made from the long, glimmering green feathers of the quetzal.

The Mayan housewives cooked the family meals out of doors on braziers of pottery or simple stone hearths, generally using kettles also of pottery. Dishes were of clay or of gourds or carved wood. A considerable variety of food was available; for the Mayas were basically agriculturalists, and cultivated beans, tomatoes, red peppers, yams, squashes, cacao, maguey, and maize, from the last two of which they made intoxicating drinks. Wild fruits of many kinds were gathered from the forests. Sweets were supplied by fruit juices and also by the honey of wild or domesticated bees, and a sirup was made from green maize stalks. Most of the animal foods were secured by fishing or by hunting and trapping such game as turkeys, pheasants, partridges, pigeons, peccaries, and deer.

Sowing and reaping and fishing and hunting were often cooperative activities and had something of the social attractiveness of the logrolling and husking bees of the American frontier. Agricultural methods were simple, planting being done merely by digging with a pointed stick, and crops being cut by means of knives of flint, obsidian, or bronze. Large catches of fish were easily secured by drugging or slightly poisoning the water with vegetable juices.

The Mayas not only were skilled as weavers but were also experts in metal work. Neither they nor any others of the American aborigines learned to smelt iron, but they did much with gold, silver, copper, and tin, which they combined into various alloys; for they knew how to cast and fuse, to draw wires, to make gold leaf, to plate, and to form the metals into various useful and ornamental shapes.

They gave great attention to commerce, and every village and town had its market, usually an open square in the larger places. Here were exchanged not only Mayan products but commodities from regions as remote as the Mexican plateau and the present Colombia in South America. Herbert J. Spinden is of the view that most of the emeralds and beautiful gold objects used by the Mayas came from Colombia; but they doubtless passed through many hands before reaching Yucatán. The most important exports to the points on the coast to the east, toward the present Panama, were articles of pottery, textiles, and food products rather peculiar to the peninsula. Chiapas, to the west, supplied a market for salt, cloth, and slaves. Most of the commerce was by barter; but various staple articles such as cacao beans, feathers, and cotton mantles passed as currency, as did bells of gold, copper, and bronze. Wheeled vehicles were unknown in aboriginal America, and beasts of burden did not exist in any part of the northern continent; hence slaves and other members of the humble classes learned to carry great loads of merchandise upon their backs to market. Between points upon the coast where there were good harbors the traders made trips in boats of various kinds propelled by paddles or sails.[1]

In matters of the mind and the spirit the Mayas reached a high state of development. Of their artistic achievements Dr. Spinden says that they "produced one of the few really great and coherent expressions of beauty so far given to the world, and their influence in America was historically as important as was that of the Greeks in Europe."[1] Their appreciation of the beautiful is shown in most of their surviving handiwork, but especially in the designs of their buildings and in their sculpture, frescoes, and pottery. Archæologists have grouped the buildings into two classes, palaces and temples, according to their supposed uses. The former are larger and have many rooms; the latter have only a few. Both types are quadrangular and have pleasing proportions. All the buildings were placed upon some sort of foundation, those of the large, heavy palaces being but a few feet high, whereas the temples surmounted terraced truncated pyramids sometimes more than a hundred feet in elevation. These substructures were always solid masses of clay and rubble faced with burnt brick, cut stone, or cement, and were ascended by steep outside staircases of stone, often placed on all four sides of the pyramid. The best mason work was done during the Old Empire, partly because there was better stone in the south, and this was carefully cut to form the walls; whereas in Yucatán the sides of the buildings were commonly made of rubble faced with poorly cut stone covered with stucco.

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[1] On his fourth voyage Columbus met off the coast of Honduras a merchant vessel made from a single very long log about eight feet wide, and worked by twenty-five paddlers. Under an awning, amidst various wares, sat the merchant himself, an important-looking personage.

The principle of the arch was unknown in aboriginal America; but the Mayas built their ceilings and secured height for their rooms by means of a false arch formed by placing each tier of stone beyond the preceding in the direction of the opposite wall until the opening was so narrow as to be covered with a slab of stone. Under this method each room had its individual arched ceiling, but was narrow and hall-like owing to the necessarily limited width of the arch. In the latter part of the New Empire, however, the arch was to some extent abandoned for flat ceilings supported by horizontal beams. This device (apparently introduced by the Toltecs) resulted in wider rooms.

Buildings of one floor seem to have been the rule, but in some cases as many as five stories existed, each story being built upon a solid core, or foundation, extending from the ground at the rear of the preceding story; for the architects were distrustful of hollow bases and did not build one story on top of another.

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[1] *Ancient Civilizations of Mexico and Central America*, p. 94.

Inasmuch as each story was set back from the one immediately lower, the whole building had something of the effect of a flight of steps. At times the topmost part of the structure was a mere ornamental crest of stonework or stucco. Stairways—sometimes placed inside, sometimes outside—connected the various stories. Floors were usually made of cement.

Windows were rather scarce, but became more numerous in the north as rooms were made larger. Doorways were plentiful, generally broad, and, in Yucatán, often multiple, the separate openings being produced by breaking up very wide doorways by means of square or cylindrical pillars, in some instances as many as eight of these being used. Curtains, or hangings, of reeds, skins, or textiles were apparently used for closing the openings.

The buildings were ornamented by painting and sculpture, and sculpture was also used for individual monuments in the public squares, especially in the cities of the Old Empire. Statues occupied niches in the walls of buildings or in the decorative crests surmounting some of them. Many of the ancient structures still standing have between the moldings on the outer walls bas-reliefs with designs showing grotesque masks and figures of animals and men. Some of these reliefs were formed from stucco, which was used also for interior decorations; others were built up like a mosaic, with individual pieces of stone. In the dead cities of Uxmal and Chichen Itza are admirable examples of this mosaic work.

In rebuilding Chichen Itza the Toltecs introduced into Mayan architecture the motif of the feathered rattlesnake—the symbol of Quetzalcoatl—and gave to the city a remarkable artistic unity. The low balustrades bordering the steep staircases of the temple pyramids and some other structures were highly conventionalized representations of serpents' bodies, and the newel posts at top and bottom were formed of their heads and rattles. There were also serpent pillars, the column itself forming the body, the head (which rested upon the floor) serving as the base of the pillar, and the rattles as the capital. Here and there on the buildings the serpent figure also appeared, in bas-relief or in the round, in a purely decorative manner.

Pigments were much used upon the sculptures, and in the decoration of the buildings with frescoes inside and out, especially during the later period. At times surfaces were painted but one color, a favorite being a deep rich red, though blues and greens were also used. Often walls were covered with contrasting bands and stripes of color and with animated and gorgeous representations of scenes involving warriors, hunters, priests, gods, and wild animals.

In design the Mayas showed remarkable ability, and could fill a given space with graceful and pleasing figures. In artistic composition and foreshortening they were perhaps superior to the Egyptians; in their use of perspective they were unquestionably so, and likewise in the general freedom and accuracy of their drawing.

They reached their artistic golden age very early, however—centuries before the close of the Old Empire. The finest examples of their work found so far are the stucco bas-reliefs at the Palenque and Comalcalco ruins in the extreme western portion of the region occupied by the Old Empire. Certain figures at Comalcalco, in particular, show a freedom and chasteness of line and a fine restraint in the use of detail worthy of the early Greeks. Toward the end of the Old Empire artistic decline began, and was reflected in the remarkable monolithic stelæ, erected in the public squares of Copán and Quirigua during the fifth and sixth centuries. These were carved in high relief with figures of gods and heroes, but they showed less skill and accuracy than the earlier work and far less artistic taste, for they were excessively overloaded with decorative detail. Thereafter, on the whole, Mayan sculpture appears to have continued on the decline, except for the temporary inspiration gained from the invading Toltecs, who themselves had been the early pupils of the Mayas.

No frescoes from the Old Empire seem to have been found, but it is perhaps safe to assume that the peak of excellence in painting likewise was reached during the Old Empire; for the high degree of conventionalization in the best paintings in the north shows that long centuries of evolution had taken place.

Yet these were made more than three hundred years before the coming of the Spaniards, and were decidedly superior to the very crude work in painting and sculpture done on the eve of their invasion.

The potter's wheel and the art of glazing were unknown in aboriginal America, and the clay with which the Mayas worked was inferior, but their pottery is very attractive because of the design and coloring. Among the finest examples of their artistic pottery are vases, censers, and funerary urns. Some of the vessels were ingeniously shaped like human heads or animals, the mouths forming the openings; but more frequently the ornamentation was in bas-relief carved or appliquéd upon the wet clay of the vessel. In the later period the designs were very commonly duplicated by means of molds. If a vessel was to be painted, often a slip of clay was applied and the colors were put on over this—reds, yellows, blues, and blacks being favorites. Frequently the designs were geometrical, but upon some of the pottery were portrayed elaborate and stirring scenes from everyday life.

The most advanced system for recording thought found in aboriginal America was devised by the Mayas. When their decline began, their glyphs were in an advanced state of transition between simple picture-writing and phonetic characters. Pictures were sometimes used; but ideographs, or symbols, appear to have been more common, and occasionally purely phonetic elements were employed. These Mayan characters were used for records cut into the stelæ and altars and upon the walls and lintels of the buildings, and they were also painted or written upon sheets of bark and deerskin or of paper made from maguey leaves. In such "books" the priests, who formed the scholarly class, kept scientific and historical records as well as ecclesiastical and civil accounts. A written literature in prose and verse may also have existed; but little is known of this, because the Spanish clergy, whose religious bigotry at first far exceeded their intellectual interest, destroyed Mayan writings with ferocious zeal. "We found a great number of their books in their characters," wrote Bishop Landa; "but because there was nothing in them that had not some superstition or falsehood of the devil, we burned them all, at which the natives were marvelously sorry and distressed."[1] So are students of Mayan culture! Only three codices of the Mayas are known to exist, and these cannot be completely read because the Spaniards neglected to leave a key for deciphering them. Very little more than the glyphs used in the numerical system have been identified, but these have been of great value for reading the dates found upon stelæ and buildings.

In their representation of numbers, in particular, the Mayas had reached a remarkable development. Thanks to one of their forgotten geniuses, they were using the principle underlying the decimal system many centuries before the Europeans had given up the clumsy Roman numerals. They and the Hindus are the only peoples known to have devised this idea of representing number values by position, which required the invention and use of the zero sign; but they are credited with developing the system before the Hindus, from whom Europe got the idea through the Arabs. But the Mayan system was vigesimal, the twenty fundamental digits coming from the counting of the toes as well as the fingers (which was easy and natural in a warm, shoeless region), whereas the decimal system resulted from the finger count only. In the Mayan method of notation the lowest number indicated by three digits was not 100 but 400, or twenty times twenty. There were at least two ways of writing numerals. In the simpler, units were shown by dots up to five, which was denoted by a bar. Three bars and four dots stood for nineteen, the highest number of the "units" in the vigesimal system. There were three or four characters used for zero, according to the material on which the writing was done. That on the codices resembled a blossom with a large center and four petals. When the position-value idea was followed, the writing was done from bottom to top. Occasionally (in connection with the calendar at least) absolute values were shown for numbers above nineteen by special characters, twenty being represented by a crescent.

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[1] *Relation des Choses de Yucatán de Diego de Landa*, p. 316.

The chief use to which the Mayas appear to have put numbers was for computing time. Through careful observation of celestial phenomena, joined with accurate counting and recording, they were able to invent a calendar which was the greatest known intellectual achievement of aboriginal America. According to Spinden a date corresponding to the year 613 B.C. is the zero of the Mayan calendar, but the calendar itself was not instituted until 580 B.C. It provided for a more exact day-count of the solar year than existed in Europe until the adoption of the Gregorian calendar in 1582 A.D.; in other words, the calendar which the Spaniards found in use in Yucatán, and destroyed, was more accurate than their own, though it had been functioning for about two thousand years.[1] The year was arbitrarily divided into eighteen periods of twenty days each, with five left-over days known as days without name. The Mayan year began on July 16 of the Julian calendar. This date was 1 *Pop* in Yucatán, Pop being the name of the first month. This was in this region the approximate date upon which the sun crossed the zenith on its way south. Mrs. Zelia Nuttall has recently emphasized the fact that the pre-Columbian aborigines dwelling within the tropics carefully noted these migrations of the sun and dated their new year from its crossing the zenith. The event was determined by means of gnomons, especially in the shape of vertically placed rods and stelæ, which, when the passing took place, failed for a moment at noon to cast a shadow. The occasion was celebrated by festivities in honor of the sun god. Among the Mayas the word for day was *kin*, which meant "sun." The year was called a *tun*. Twenty tuns formed a *katun*, which, multiplied by twenty, made a period of time called a cycle by modern scholars, for the native name is not known.

The Mayas were also learned in general astronomical lore. They were familiar with the movements of the constellations and were able to foretell eclipses; and they apparently had calendars based on the movements of the moon, Venus, and Jupiter, as well as on that of the earth with relation to the sun.

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[1] There is a difference of opinion among archæologists regarding the correlation of Christian and Mayan chronology, owing to a question as to when the ninth Mayan cycle began. British scholars place the date two hundred and seventy years earlier than do Spinden and Morley, the leading American authorities.

Their artistic and intellectual achievements were largely byproducts of religion, which was apparently a very dominant interest. With the aim of securing prosperity and happiness they gave attention to the spiritual forces believed to be behind human concerns. These forces were exceedingly numerous: there were gods many and lords many. Some were friendly to man, others were ill-willed; and the aid of the first was invoked against the evil designs of the second. At the head of the complicated and extensive Mayan pantheon was a father god, or creator, who was a vivid reality to the leading minds; he was perhaps of little concern to the rank and file of the population, whose humble interests led them to magnify the lesser gods. There was also a god of the sky, as well as of the North Star, the moon, and the sun; but the sun was the most important of the celestial deities. Thunder, lightning, and wind had their deities; likewise the rain, about which a notable cult developed in the semiarid northern part of Yucatán. One deity presided over war; another (a goddess) over suicides; but the life-sustaining maize, the most important source of food in the Western Hemisphere, had also a guardian spirit. Perhaps the most unfriendly and unpopular member of the pantheon was the god of death, who, appropriately, was portrayed with a body partly skeletal and partly fleshed. There were a multitude of other deities besides, many of whom were connected with the detailed activities of life. Ancestors were also consciously worshiped; and some of the major gods were important human beings, an example being Quetzalcoatl, or Kukulcan, who was made deity of the morning star because he correctly predicted that on a certain date Venus would appear as the star of the morning.

The Mayas firmly believed in a life after death; but their views of its nature seem to have been rather vague, for, like the ancient Greeks, their chief concern was with the adventures and problems of earthly living, and it was in this connection that they sought the aid of friendly spirits and tried to propitiate those of evil disposition and mischievous intent.

The chief instrumentality for gaining these ends was the clergy, who were divided into two classes: orders of monks and nuns living under vows in communal establishments, and secular priests, who were the real go-betweens for the people and their gods. Through images in the temples and shrines under care of the secular priests, the deities were worshiped—usually with songs, prayers, and offerings of incense, flowers, fruit, and lower animals, and also with the blood of penitent individuals, made to flow by pricking the limbs, tongue, or ear lobes with thorns. There is no evidence that human sacrifice existed among the Mayas before the twelfth century; but it was brought into Yucatán by the Toltecs and afterwards practiced there, especially in times of distress. The heart of the human offering was commonly torn out by the priest before the image of the deity; but the god of rain, who was believed to dwell in the great *cenote*, or natural well, at Chichen Itza, was worshiped by throwing human beings, especially young maidens, into the water, together with lesser gifts, such as copal, jade, and gold. These special sacrifices, accompanied with much ceremonialism, were made to the god of the sacred well in times of serious drought, and processions of priests, penitents, and sacrificial victims converged at the cenote from various parts of the arid land, in an effort to propitiate the rain god and induce him to send the needed showers.

Besides serving regularly in the temples and officiating on important public religious occasions, the secular priests performed many minor religious duties. Among these were the offering of incense at the corners of the maize fields to insure good crops, the baptism of children (which in the late Mayan period took place between the ages of three and twelve), and hearing the confessions of individuals whose sins were believed to have brought illness or other misfortune to the community or of those who were near death; for the Mayas had a very definite belief in a system of rewards and punishments in the after life, and confession was thought to help toward wiping out a bad record.

THE TOLTECS AND THEIR CONTEMPORARY KINDRED

After the Mayas, the next people to rise to a high state of culture in the region between the Rio Grande and Lake Nicaragua appear to have been the Toltecs, one of several related groups all of which spoke the Nahua tongue. Like the Mayas, the Toltecs built upon a foundation laid by an archaic agricultural people, but practically nothing is known of early Toltecan history. However, the Toltecs probably entered the Valley of Mexico from the north in the first part of the Christian Era and conquered the inhabitants of the region, from whom they doubtless acquired new ideas. But they soon surpassed their vanquished teachers and became the builders of massive cities. One of these, Tula, is believed by students of the subject to be today represented by the ruins known as San Juan Teotihuacán, lying about forty miles to the northeast of the Mexican capital.

From the Mayas—perhaps at the time of the migrations following the break-up of the Old Empire—the Toltecs acquired cultural ideas superior to their own. These they adapted and transmitted to other groups by conquest; for at the beginning of the eleventh century they began to spread rapidly, and advanced to the north about as far as the tropic of Cancer and southeastward to beyond the Isthmus of Tehuantepec. During the height of their power not only were practically all the other Nahua peoples their tributaries, but, as has already been stated, some of the Mayan cities as well. In the thirteenth century the Toltecan empire, weakened by civil war, fell to pieces; some of the cities were abandoned, and others were conquered by later invaders.

Much of the cultural progress of the Toltecs in their later period was due to their great hero Quetzalcoatl, who is credited with introducing among his people the best fruits of Mayan thought, including their mathematical and astronomical discoveries. The additional borrowings of the Toltecs from the Mayas were doubtless considerable, though it is not easy to determine just what they were. It is pretty certain, however, that among them were basic architectural ideas; for in San

Juan Teotihuacán are found the same types of buildings as in Yucatán, but the structures are on a larger scale, owing perhaps to the abundance of *tezontle*, or porous lava, used for much of the core work in the buildings. In this archæological Toltecan city, which appears to have been the religious capital, is a pyramid about two hundred feet high that once supported the temple where the sun god of the Toltecs was worshiped. It is apparently the tallest artificial structure in America dating from the aboriginal period. The masonry buildings of the city were decorated, like those of the Mayas, with frescoes and sculptures; and on one of the temples are found figures of the feathered serpent, which was the dominant artistic motif in the Toltecan city of Chichen Itza, Yucatán.

One original contribution of the Toltecs is definitely known—a ball game which they played with enthusiasm within their earlier borders and later introduced into Yucatán. Perhaps the best preserved of their ball courts so far found is that at Chichen Itza; this was built of masonry, with a large stone ring set in each of two high opposing walls. The game consisted in driving a rubber ball through the rings without touching the ball with hands or feet.

The most advanced contemporary relatives of the Toltecs were probably the Zapotecs, who occupied the southwestern part of the present Mexican area. In the state of Oaxaca still stand the ruins of Mitla, their sacred city, one of the chief sources of knowledge regarding them. Here the buildings, which stand upon low terraces, are grouped around courts, into which they open. The same materials were used for the structures as in Yucatán and at San Juan Teotihuacán—rubble, stone, and cement. What most characterizes Mitla is the very extensive use of mosaic stone sculpture in geometric designs for covering the walls of the remaining buildings, outside and in. The effect is an Oriental richness. Small inset panels of frescoes, showing accuracy of design and pleasing color combinations, were used for additional interior decorations. By means of glyphs similar to the Mayan ones and derived from them through the Toltecs, the Zapotecs kept records; and they shared with the Toltecs and other advanced peoples under Toltecan rule the calendrical and mathematical knowledge gained from the Mayas.

THE AZTECAN CONFEDERATES AND THEIR TRIBUTARIES

After the Toltecan empire had fallen into weakness and disorganization, part of its remnants were conquered and absorbed by groups of other Nahua-speaking peoples, the Chichimecas, coming from the north. These invaders, when they entered the Valley of Mexico (probably in the late twelfth or early thirteenth century), were nomads far inferior in culture to the Toltecs, but they settled down and proceeded to learn of the latter. The first of the Chichimeca groups to rise to prominence appears to have been the Acolhuas, who built a city called Tezcoco, near a lake to which they gave the same name. The Aztecs probably arrived in this section later, and some time in the fourteenth century they established themselves on an island in Lake Tezcoco, calling their city Tenochtitlán.[1] As they grew in strength and ambition the Aztecs formed alliances with the Acolhuas of Tezcoco and with the Tecpanecs, who were settled at Tlacopán. At first the Acolhuas were dominant in the partnership; but during the middle of the fifteenth century the Aztecs gained political and military supremacy, though Tezcoco remained the cultural leader.

Under Aztecan guidance the confederacy developed an intensely militaristic psychology, resulting in aggressive warfare. To the south, in particular, campaigns of conquest were made by the three allied groups, who divided the spoils of war and the tribute required from the conquered peoples in proportion to the part played in the undertaking—the Aztecs and Acolhuas each taking two fifths, and the weaker, less important Tecpanecs the remaining fifth. For a while some of the peoples of Guatemala were vassals of the three allies; and the Huastecs and Totonacs, in the region of Vera Cruz, had recently been conquered by them when the Spaniards landed. But between these dependent peoples and their conquerors were groups, such as the Tarascans, which preserved complete independence; in fact, the so-called Aztec "empire" was made up of the three confederate tribes, each of which was sovereign within its original borders, and a number of outlying tributary groups, most of them ready to throw off allegiance at the earliest opportunity. At its utmost limits the territory occupied by the allies and their vassal tribes was perhaps not more than half as extensive as that once under Toltecan supremacy.

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[1] Tradition says that the men of the tribe who had been sent ahead to find a place for settlement saw on one of the islands a *tenochtli*, or cactus plant, upon which was perched an eagle holding a serpent in its mouth. This they took as a divine omen and decided to locate upon the island. As the Aztecs prospered in their new home they chose the eagle, serpent, and cactus as their emblem, now found upon the flag of the Mexican republic.

In the culture possessed by the Aztecs and their allies and tributaries there was little of originality. Its best elements came from the Mayas and Toltecs. The heritage from the Mayas, coming through the Toltecs, was chiefly artistic and intellectual; that from the Toltecs themselves was governmental. But, like the Romans, the Aztecs had a decided talent for organization. Among them the political grouping was based upon blood ties. The populous Aztecan capital, Tenochtitlán (later known as Mexico City), was divided into about twenty clans made up of related people, each clan having its own section of the city and its own council of elders, who ruled the group locally in most matters. In addition, there was for each clan a military chieftain to train the soldiers and lead them to battle, and a civil administrator who had charge of distributing clan lands and similar duties. The clans were, in turn, formed into four groups corresponding somewhat to the Roman curia; but such a classification appears to have been employed only occasionally, for the purpose of military efficiency or the organization of religious festivals. Each of the four subdivisions of the city had its war chief, who also served as judge, its military school, and its arsenal. The other cities appear to have been organized on similar lines.

The central, or tribal, government was in the hands of a theocratic oligarchy. The chief, or "emperor," was chosen from certain families by an exclusive group of electors, and was often the brother of his predecessor and at times a nephew or a son; but military efficiency rather than ties of blood determined the choice. The despotic tendencies of the ruler were restricted by a council made up of one member from each clan and by the two high priests, who acted as special advisers. All legislation of a general nature was in the form of imperial decrees.

The Aztecs had a well-developed system of justice; but the royal law court, which was housed in the palace, had only general jurisdiction. At the head of the judicial systems of the chief cities, each of which had its outlying lands, was a judge appointed for life by the emperor but quite independent of him and his court in both civil and criminal cases. Offenders against the criminal law might, however, appeal their cases from the lower city courts to those of the supreme municipal judges. Merchants had their own courts. Witnesses were placed under oath by being required to touch the ground with their fingers and then place them on their lips, thus swearing by Mother Earth, or the earth goddess. By means of picture writings, some of which were very graphic, the court decisions were preserved. For instance, an arrow drawn across the picture of a condemned person meant a death sentence. The laws were harsh, though not much more so than those of sixteenth-century Europe, and capital punishment was very common and cruel. He who stole in the market place was beaten to death on the spot, and a thief of precious metals was skinned alive and his body sacrificed to the god of the workers in gold and silver. Drunkenness in the able-bodied was at times punished by death. Petty offenders were, in various cases, enslaved to those whom they had wronged. Slanderers had their hair singed down to the scalp.

The machinery of government and the administration of justice of Tezcoco and Tlacopán and the cities under their control were very similar to those of the communities dominated directly by the Aztecs. The expenses of government were met chiefly by means of tribute exacted from conquered peoples and by the income from land set aside as endowment of the temples, the army, and the civil departments. But every clan, or village group, likewise had land owned as a community and parceled out by its chief civil officer to individuals for cultivation.

In the social classification those first in rank below the tribal chief were the numerous nobles, including high officials of religion, war, and civil government. Next came the leading merchants, who were respected and influential. Below them were the free peasants and artisans, who formed the rank and file of the nation. At the bottom of the social system was a considerable slave class composed of war captives, people deprived of freedom as punishment, and children sold into bondage by their parents because of poverty. But in ancient Mexico slavery was remarkably mild and humane. The work of the bondman was carefully limited by law; he possessed civil rights and might own property, even including slaves; and his children were born free. Slaves were rarely sold unless they proved vicious, and it was customary for masters to free by their wills loyal and faithful bondmen.

In appearance the Nahuan peoples who occupied the plateau of Mexico four hundred years ago were much like their descendants who now live there. Their dress and ornamentation were similar in style to those of the Mayas, but a heavy, square cotton mantle was often worn over the shoulders for protection against the chill air of the highlands. Their food too was very like that of the Mayas; and even at the present day the humble folk of Mexico have the same basic fare as did their ancestors many centuries ago—beans, stews highly seasoned with chili pepper, and thin, unleavened cakes of maize meal, called *tlaxcallis* by the Aztecs and *tortillas* by the Spaniards.

The rank and file of the nation lived in shelters closely resembling the huts of the humble Mexicans of today. In the warmer regions these were made from maize stalks, grass, palm branches, bamboo, and the like; in the cooler altitudes the building materials were sun-dried bricks. The homes of the nobility and the public buildings were very similar to those of the Toltecs, cut lava being commonly used for surfaces, and rubble and clay for filling. From the Toltecs the Aztecs also borrowed the idea of high foundations for their temples. The chief sanctuary of Tenochtitlán was upon a pyramid having a flight of a hundred and fourteen steps, an elevation permitting a view of the neighboring towns as well as of all parts of the populous capital. Some decoration in sculpture and painting was employed on the walls of the best buildings; but as artists the Aztecs and their neighbors were inferior to the Mayas, the Toltecs, and the Zapotecs. Walls and fortresses were employed for the protection of some of the cities; but Tenochtitlán, because of its situation in the lake, had much natural protection. Connecting it with the mainland were high causeways, cut at intervals by sluices spanned by wooden bridges, which in a crisis were removed to prevent approach to the city. Boats too were used for crossing between the islands and the margin of the lake.

A great deal of attention was given to agriculture by the Aztecan dwellers in Anahuac, for here nature alone could not be counted upon to supply food. The hard soil had to be tilled, and the mountain streams tapped to supply moisture in times of drought. Maize, beans, cacao, maguey, and cotton were the standard crops. So great was the interest in plants that in the cities there were extensive botanical gardens, or nurseries, such as were unknown to contemporary Europe.

Trade and commerce, highly respected occupations, received encouragement and protection from the government. Every town had at least one market place, where the merchants (most of them traffickers on a small scale) could exhibit their wares. Much of the commerce took the form of barter, but a system of currency was in use. For large transactions quills filled with gold dust and cotton mantles of the standard type were the common measures of value, and red shells and bags filled with cacao beans constituted small change. Many merchants traveled like large-scale peddlers, from town to town, trading in slaves, textiles, featherwork, pottery, jewelry, and other commodities, and accompanied by a group of men who could, if the need arose, turn soldiers for the defense of the caravan. Such merchants often served their sovereign as spies through their opportunities for learning of projected uprisings or of the movements of enemies.

More important than agriculture or trade was war; to it the thought of the whole confederacy was bent, but in its pursuit the Aztecs were the most zealous. Political ambition and the desire for spoils and tribute resulting from military conquest were common reasons for aggressive warfare; but more vital was the need for new supplies of prisoners to be sacrificed to the deities, particularly to the bloodthirsty, insatiable Huitzilopochtli, god of war and patron of the Aztecs. Hence war was prosecuted with fanatical zeal. The mere refusal of a city to pay tribute upon demand was thought good cause for attacking it; and when this was done care was taken to capture as many of the inhabitants as possible instead of killing them. The armies were well organized and disciplined and were usually led by the chiefs in person. Weapons were of the type used in Europe before the invention of firearms,—bows and arrows, spears, and swords,—but were made of wood tipped or edged with stone instead of iron. Armor consisted chiefly of a corselet of woven material heavily padded with cotton, which turned the primitive weapons so well that the Spaniards later made use of it, and a helmet, usually of wood, but at times—for high officials—of silver decorated with gold, precious stones, and tufts of brilliant plumage.

In the chief cities there were hospitals for the sick and the wounded, with quarters for permanently disabled soldiers. According to a contemporary Spaniard the physicians in charge "were so far better than those in Europe that they did not protract the cure in order to increase the pay." They also knew well the healing qualities of a great variety of herbs and were perhaps as skilled in surgery as medical men in Europe at the time.

Religion probably played even a larger part in the lives of the people under Aztecan dominance than it did among the Mayas and the earlier Nahua peoples; for the former inherited many of the gods of their predecessors while retaining those which they worshiped when they arrived in the Valley of Mexico. Among the multitude of deities two, in particular, appear to have been outstanding: Huitzilopochtli, the monster god who loved war and presided over it, and was perhaps closer to the thoughts of the rank and file of the people than any other; and a supreme deity, "unknown, unseen, shapeless, and formless," "the cause of causes." This deity, a legacy from the Toltecs, appears to have been a modified Quetzalcoatl, who fostered productiveness and the eternal renewal of life, or immortality. In prayer the Mexicans addressed this supreme god as "the Creator and Maker, or Former, who dwells in heaven and is the lord of the earth; who is our celestial father and mother, great lord and great lady."

This conglomerate aggregation of deities, brutal and noble, was served by a vast army of clergy of graded ranks, headed, in the case of the Aztecs themselves, by two high priests. In Tenochtitlán alone there were said to have been five thousand connected in one way or another with the principal temple. Those not committed to direct service of the gods trained the choirs or were engaged in general educational work or other important functions. Women as well as men belonged to the priesthood, and appear to have performed all duties connected with it except the offering of sacrifice. There were regular clergy as well as secular, and the nuns and monks living under strict vows made a definite contribution to the religious thought and tone of the period. All the gods, except perhaps Quetzalcoatl in his most spiritual aspect, were worshiped through images by means of prayers, chants, processions, dances, and sacrifices. The offerings to most of the deities were usually gold, incense, flowers, fruits, and the like; more rarely, birds and other small animals; but some of the greater gods, and especially Huitzilopochtli, as has been stated, would be satisfied only with the lives of human beings. Hence thousands were annually offered up to these tyrannical conceptions of the supernatural, and the bodies of the victims were often disposed of later at cannibalistic banquets.

These dwellers upon the plateau of Anahuac had a very vivid conception of sin, and this apparently gave to their religion a seriousness which in time developed into a grim morbidness culminating rather logically in excessive human sacrifice. Infants were believed to have been born in a condition of sin existing even "before the foundation of the world," and to wash away the stain they were baptized by sprinkling with water upon the lips and breast. In connection with this ceremony they were given a name. At different periods in life, especially near its close, persons confessed their sins to the priests, under whose direction they made atonement by fasting and penance.

The Aztecs and their kindred believed firmly in a life after death, the character of which was determined largely by the way in which the individual had acquitted himself in this world. The wicked, who formed the vast majority, dwelt forever in a realm of darkness, far from the benevolent sun god; but those who died in battle or on the altar of sacrifice were promptly admitted into the presence of this deity and were permitted joyously to accompany him in his journey through the sky. Compensation appears to have been made to persons who died of certain diseases through giving them a celestial abode where contentment was assured but life was colorless and uninteresting. The remains of the dead were disposed of by burying or burning, and with them went as elaborate an equipment as circumstances permitted, to be used by the spirit in the journey to the land of the shades or after arrival there. The wives and servants of a man of high rank were put to death in order that they might continue in the service of their lord. His body was strewn with magical pieces of paper to charm away the dangers on the road; a special cloak was wrapped about him to protect against a cutting wind to be encountered at a certain point in the journey; and at his feet was placed a little dog, killed that its spirit might guide the master safely across the perilous nine waters over which his soul must pass before it could reach the realms of the eternal.

The clergy were the educators and scholars of the Aztecs and their allies. Under their instruction came the children of the upper and middle classes, the only young people to be given formal education. The girls were under the charge of the priestesses; the boys, under that of the priests. The training was practical rather than bookish, and was intended to fit the children for life; and to this end the teachers gave much stress to moral discipline and service to the gods.

Through their heritage from the Toltecs the Aztecs and their kindred were able to keep records by means of pictures rather well drawn, supplemented by hieroglyphics. Their method of writing numbers was very similar to that of the Mayas, and doubtless came from the latter through the Toltecs. From the Mayas came also their calendrical ideas; but since they did not fully grasp the characteristics of the Mayan division of time, they could not fix dates exactly except within their own cycle of fifty-two years—a limitation which led to confusion among them as regards the sequence of the cycles, as well as among present-day archæologists. The Aztecan priest-scholars knew the cause of eclipses and were familiar with some of the most important constellations, but perhaps much of the astronomical lore of the Mayas was lost upon them. Like other peoples of a similar stage of advancement, they firmly believed that the heavenly bodies influenced the character and destinies of man.

Despite the ferocious aspect of their religion the Mexicans of the fifteenth century were kind and gentle, loved birds and flowers to an unusual degree, and delighted in music, æsthetic dancing, dramatic performances, and literature. For the encouragement of intellectual and artistic achievement there existed an academy, or council of learned men. One of its duties was to establish and maintain standards for the teachers in the schools; another was to act, together with the three allied rulers, as a body of judges of the literary and historical contests which took place at intervals, and to distribute prizes for the best entries. Most of the compositions were in verse, and dealt with the past of the Mexican tribes or with philosophical and religious reflections. The finest literature came from Tezcoco, the Athens of the alliance, and was partly inspired by the noble writings of its poet king Nezahualcoyotl, who died during the latter half of the fifteenth century. The following extract from one of his songs translated into Spanish shows that the royal bard was Epicurean in his philosophy:

> Banish care; if there are bounds to pleasure, the saddest life must also have an end. Then weave the chaplet of flowers, and sing thy songs in praise of the all-powerful God; for the glory of this world soon fadeth away. Re-

joice in the green freshness of thy spring; for the day will come when thou shalt sigh for these joys in vain; when the scepter shall pass from thy hands, thy servants shall wander desolate in thy courts, thy sons and the sons of thy nobles shall drink the dregs of distress, and all the pomp of thy victories and triumphs shall live only in their recollection. Yet the remembrance of the just shall not pass away from the nations, and the good thou hast done shall ever be held in honor. The goods of this life, its glories and its riches, are but lent to us, its substance is but an illusory shadow, and the things of today shall change on the coming of the morrow. Then gather the fairest flowers from thy gardens, to bind round thy brow, and seize the joys of the present, ere they perish.[1]

THE CHIBCHAS AND THEIR NEIGHBORS

In the narrow part of the isthmus uniting the two continents and in the territory now occupied by Colombia were other groups of advanced aborigines, forming links between their neighbors to the north and those living farther south, and bringing about, in a slow, indirect way, a degree of ultimate cultural exchange between the two continents. These midway-placed aborigines were not, on the whole, as advanced as the peoples on their extreme western and southern borders; but they were not greatly inferior to either. In their type of culture they were apparently closer to the inhabitants of ancient Peru than to those of Mexico.

Their comparative backwardness was due to lack of strong political organization, for practically the whole population was made up of mere tribes, led by head men, or chieftains; but the highlands had made more governmental progress than the hot, moist lowlands. The most generally advanced of the groups were the Chibchas, who lived on the high plateau eastward of the Magdalena River. Though the tribes of the Chiriquí region on the Isthmus excelled all others as artists, especially in gold work, the Chibchas were politically far in advance of the other inhabitants of the middle section under consideration. When the Spaniards found them they were apparently developing what might have become an empire similar to that of the Toltecs.

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[1] William H. Prescott, *Conquest of Mexico*, Vol. I, pp. 178–179. Edition published by David McKay, 1892.

The chief of the region then known as Bogotá (now marked by the Colombian capital) had become more powerful than the other Chibchan rulers and had gained considerable control over them. The Chibchan chiefs as a whole had absolute authority within their tribes, not only in political matters but apparently in military affairs as well; they also had a dominating influence over religion, for they appointed all the priests, and in the popular view they themselves were half divine.

In general the religious ideas and practices of the Chibchas were similar to those of the Aztecs, but human sacrifice was not practiced to such a great degree. The gods of the sun and the moon seem to have been held in special reverence, but scores of other deities received attention. It was the Chibchan worship of the lake of Guatabita in Colombia that gave rise to the legend of *El Dorado* (The Gilded One) and caused intrepid Spaniards to explore the interior of the region so diligently in search of gold. As part of his inauguration ceremony, the chief of the Chibchas in the vicinity of the lake was covered with gold dust and was required to plunge into the sacred waters, thus giving to the spirit of the lake the precious metal with which he was clothed. At the same time his attendants made other offerings of gold and of emeralds to the god of the waters.

The Chibchan laws were perhaps no severer than those of Europe at the time, and in some cases they were more just. Among the Chibchas, for instance, the right to whip one's marital mate was reciprocal; but the wife was limited to six lashes in chastising her husband, perhaps because polygyny was very common! Some of the laws were quaintly direct and coercive in their operation, as illustrated by those applying to defaulters. If a man failed to pay the tribute due his chief, a court attendant, taking with him a bear or a puma, was quartered upon the delinquent; and for each day that the unwilling host was in arrears he must pay a cloth garment to his lord. Minor cases of default were sometimes punished by putting out the offender's fire, with prohibition against rekindling until the debt was paid.

The Chibchas had reached a considerable degree of skill in agriculture. Maize, as in many other parts, was the staff of life. The cotton that they cultivated was the chief material for their clothing. As builders, however, they were backward; even their temples—made at times from stone poorly hewn, but more often from sun-dried bricks, bamboo, palm leaves, or like materials—were little more than huts. Hammocks woven of agave or other strong fibers were their chief articles of furniture and were used as beds as well as seats; but among the higher classes stools or chairs were also found.

Most of their implements and weapons were of wood or stone; for though they could skillfully work most of the known metals except iron, they employed them largely for purposes of ornamentation or religious sacrifice.

The Chibchas and their highland neighbors to the south were addicted to chewing the coca leaf; *chicha*, made from fermented maize, they drank to excess, especially in connection with their religious festivals.

PRE-INCAN PEOPLES OF THE PERUVIAN AREA

Although there has been comparatively little archæological investigation of the region which the Inca empire occupied at the time of the Spanish conquest, it is certain that as early as the beginning of the Christian Era there lived in this territory people who had made considerable progress toward civilization. The basis of their development was agriculture, made possible by irrigation from the swift mountain streams. Among the products of their farms were maize, cotton, potatoes, peanuts, red peppers, and various kinds of native fruits. They or their ancestors domesticated the llama and the alpaca and wove their fleeces into cloth. As workers in stone and clay they had made a good beginning, as is shown by the ruins of stone buildings still surviving and by the crude but promising sculptures molded from clay and carved in granite.

In the opinion of Julio Tello, the Peruvian archæologist, this archaic epoch ended about the close of the eighth century of the Christian Era, owing to the rise of different local cultures. The most important cultural centers so far discovered are Chavín de Huantar and Tiahuanaco in the highlands, the former well to the north of Lake Titicaca and the latter slightly to the south; Chimu, of which Chanchán was probably the capital, upon the coast to the north; and the territory centered about the Nasca valley, to the south of Lima.

All these cultural groups were polytheistic and apparently gave special reverence to the heavenly bodies, notably the sun and the moon. All were probably under theocratic rule, with a king, or chief, who was also the half-divine priest of his people. As heirs of the archaic people referred to, they were agriculturists, and practiced irrigation extensively in the arid coastal section. Furthermore, they had learned to weave from the wool of the alpaca and its relatives exquisitely fine fabrics in elaborate patterns and glowing colors and to make embroideries Oriental in intricacy of design and richness of dyes. The thread used was made with distaff and spindle, for the spinning wheel was unknown in aboriginal America; and the web was made on the simplest of looms. The needles employed were of bronze or of the long, sharp spines of desert plants.[1] The garments worn by these people were of the generally quadrangular shape seen in the dress of the ancient Mexicans. These early people were skilled workers in all metals except iron, and made utensils and ornaments of gold and silver as well as of bronze. Among the most interesting surviving ornaments are gold and silver figurines of their llamas and alpacas.

At Chavín and Tiahuanaco, where excellent stone was abundant, this material was used for buildings, and much skill was developed in working it. The ancient masons erected great temples and palaces which contained in their walls hewn granite stones many feet in length, and wide in proportion, some of them carved with bas-reliefs in attractive and intricate patterns. In the coastal Chimu and Nasca sections, where there was little good stone, clay for sun-dried bricks was plentiful, and from these the buildings were formed. This material lasted well in the arid climate, which made it possible also to paint or fresco the walls of the structures in bright colors, outside as well as inside. Stucco bas-reliefs were likewise used for decorating the buildings.

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[1] Because of the rainless character of the Peruvian coast the ancient burying places of this region have proved almost perfect conservers of the treasures which were placed with the dead. Among the most interesting relics from the graves are numerous workbaskets, examples of which may be seen in the Natural History Museum of New York City. The baskets were woven in fancy patterns from fine reeds and have hinged, well-fitting covers. They usually contain spindles, spinning whorls, numerous balls of fine woolen thread, wool, needles, and often an unfinished piece of work.

Fine pottery work was general in the four cultural areas referred to, but that of the coastal section appears to have been superior to the product of the plateau. In the Chimu region to the north the work in clay was primarily sculptural, and was of a strongly realistic type. Practically every aspect of the lives of the people who inhabited the territory about a thousand years ago may be studied by means of the thousands of pottery vessels recovered from the graves. These vessels, which were used to contain drink for the dead, are in every conceivable shape, from that of a fat, knobby potato with unmistakable eyes to a representation of a man being sacrificed to a ferocious-looking deity. A large proportion of the *huacos* (as these vessels from the graves are called) are in the shape of human beings engaged in various activities. Some of them are unquestionably portraits —faithful likenesses of individuals with dignified mien; others represent persons "making faces" of a grotesquely amusing sort, or portray afflicted folk—the lame, the halt, the blind, and the hare-lipped. Some of the huacos are plain round-shaped vessels with single or double spouts, ornamented by means of a clever little sculptured figure of a bird, frog, monkey, or other animal. Bas-reliefs are used to decorate others of the jars of conventional type. Some of the vessels are colored solid black or red, but often the sculptured figures are painted in lifelike manner. The Chimu artists were, however, primarily sculptors: color was subordinate to form.

The pottery of the Nasca valley type, on the other hand, displays only incidental interest in sculptural shape but much attention to pattern and color, and great skill in these lines. In the highly conventionalized designs and in the more natural and lifelike ones painted upon the vessels there are a richness of line and color and a harmony and grace which Julio Tello likens to the Byzantine. Blue, red, yellow, brown, black, and white pigments appear in various tints and shades in beautiful combinations, suggestive in some instances of the ancient Nasca textiles, which were especially artistic in color and design.

THE INCAS AND THEIR EMPIRE

The various cultural groups of the Peruvian middle ages began probably in the eleventh century to come under the control of the Incas, a tribe from the high mountains to the east of the great Andean plateau.[1] These energetic people were perhaps, on the whole, as advanced as any of their contemporaries of the general area under consideration; and they had very superior political potentialities. Within the next few centuries they conquered many of the neighboring tribes, consolidated and centralized most of them to an extreme degree, and gave to the people over whom they held sway a unity that was not only political but economic, cultural, linguistic, and religious as well. The recently conquered outlying fringes of the empire were partly made up of mere tributaries, but the older, more central parts formed a closely knit whole. The most powerful among the conquered tribes were the Aymarás; their territory lay to the south of Titicaca, in the region of Tiahuanaco, which was probably built by their ancestors. At its greatest extent the empire of the Incas occupied a strip of territory about fifteen hundred miles long and averaging perhaps three hundred in width. It reached well to the north of Quito and as far south as the Maule River, in the present state of Chile; on the west it was bounded by the ocean, and on the east it ran at some points into the lowlands beyond the Andes. The basis of the empire was agricultural communism, making possible a dense population which, at the time of the Spanish conquest, may have numbered as many as eight or ten millions.

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[1] Hiram Bingham, *Inca Land*, p. 339. In the opinion of Mr. Bingham, who headed a Yale University expedition to Peru, the city of Machu Picchu, the ruins of which the members of the expedition visited in 1911, was the birthplace of Manco Ccapac, the first ruler of the Incas.

The political center of the country was Cuzco, built, or rebuilt, by the conquerors more than eleven thousand feet above the ocean and about two hundred miles northward of Lake Titicaca; but Quito was a secondary capital, erected in the later period of the empire, after conquests in this region. The territory of the Incas, with Cuzco as a point of departure, was divided according to the points of the compass. From this fact the empire is said to have gained the name by which it was known to its inhabitants, Ttahuantinsuyu, meaning, in the Quechua tongue spoken by the Inca tribe, "the Four United Provinces," or "the Four Quarters of the World." For administrative purposes the population of each of these four divisions was grouped on a decimal basis, beginning with the *chunca*, a unit of ten families. In charge of this group was the *chunca camaya*, whose duty it was to report to a superior officer the vital statistics of his unit, all its physical needs, and all violations of law. Ten chuncas formed a *pacha*, presided over by a camaya, to whom the chief of the chunca was responsible, and so on up to the *hunu*, which appears to have been the largest decimal group. The camaya of the hunu seems to have been directly under a viceroy, who was the emperor's special representative and inspector in the province and who bore a title meaning "He who sees all."

The head of the government was the hereditary emperor, usually known as *the* Inca, who was believed to be the descendant of the sun god and was therefore a sacred personage. Even the greatest nobles of the realm showed their inferiority to him by entering his presence in a stooping position with a small burden on their backs. Yet the power of the Inca was considerably limited. Tradition and precedent required that he rule justly and wisely. In his efforts to do this he was willing to weigh carefully the advice of his council, of which his four viceroys formed a part.

The judicial system included judges of various grades, beginning with a sort of justice of the peace (apparently identical with the chunca camaya) having concern with very minor offenses, and extending through officials who tried increasingly serious cases up to the supreme judge, the Inca himself. Unlike the Aztecs, the Incas had no regular provision for appeal of cases; but perhaps this lack was largely met by the requirement that every month each judge should make a report to the judicial officer next above him. Justice was never denied or delayed; according to the ancient chroniclers a decision must be reached in five days. Punishments were very severe, especially in the case of public officials who offended against the law. According to Garcilasso de la Vega, whose mother was of royal Inca blood, the duties of the lowest judges were so detailed as to include the punishment of children of the community for their offenses, "although it should be only a child's naughtiness." The father also was chastised for not giving the child better training in general conduct and good manners. Thus through the joint efforts of parents and judges, declares the chronicler, "the youths became so amenable that there was no difference between them and the gentle lambs."

The government was supported chiefly by means of the income from a portion of the soil, by monopoly of precious stones and precious metals, and by tribute, which included forced labor. The taxes were especially heavy upon the outlying, recently conquered tribes. To keep them from revolt, and perhaps also to relieve congestion of population, colonies of people from the interior of the empire were placed among them.

For the purpose of sending communications and armies rapidly from one portion of the realm to another, great roads were built, one of the main ones running along the highlands, and another, generally parallel to it, keeping close to the coast. Inasmuch as wheeled vehicles were not known in aboriginal America, the highways were rather narrow, perhaps never exceeding twenty-five feet. In many places they were paved with flat stones and bordered with walls and rows of shade trees; but where they ran over the shifting sands of the desert the way was merely marked by long poles set in the earth at short intervals. Every obstacle except these unstable desert sands was conquered by the Incan engineers. They spanned rivers and gorges by means of short bridges of stone or wood or long, swinging ones of osiers and fiber ropes; they built causeways across swampy ground; they ran their highways over the steep Andean walls, in some places by cutting flights of steps in the living rock. At short distances along the routes were storehouses for equipping and provisioning the national army, and also inns and posthouses. At the latter dwelt the Inca's *chasquis*, or runners, who, in short relays, carried official communications to every part of the land. These men were liveried and had the right of way on the roads, and they were so speedy that an imperial decree from Cuzco could reach Quito, more than a thousand miles away, in eight days. Travel upon Lake Titicaca and other waterways was done by means of boats made of reeds, with square sails of the same material.

Though the government of the Incas was benevolently despotic, it was also paternally socialistic, owing perhaps to the needs of a comparatively dense population. The labor of most of the inhabitants and all the natural resources (except salt springs, which were very abundant) were under imperial control. Because of the steep, stony character of some parts of the land and the lack of rainfall in others, a considerable fraction of it was unfit for agriculture. The remainder was divided into three parts: for the support of the imperial machinery, of religion, and of the population as a whole. Each individual was given the use of a plot of ground large enough to support him. At his death it reverted to the state, to be allotted to another at the periodical redistribution. For purposes of labor the rank and file of the population was likewise divided up, according to age, location, and the service expected. Those past sixty years of age belonged to the dotage, or "no-work," class. The most important group industrially were the *purics*, or able-bodied individuals between the ages of twenty-five and fifty who worked under supervision. Labor was specialized according to community, skill being handed down from parent to child: one village would be largely given over to pottery work, another to the making of weapons, and so on. But the need for warm clothes in the highlands, where most of the population existed, caused weavers to be found in practically every village. All these laborers were expected to stay in their communities. In the days of the strongest imperial organization no one was permitted to travel except the Inca and his officers, soldiers, and other employees.

The paternalistic character of the Incan rule is best shown in the agricultural laws, which required that all able-bodied individuals not exempted by other employment should labor under officials at planting, cultivating, and harvesting the crops. The classes of land were taken in regular succession, beginning with tracts set apart for the support of religion. Next came the fields of those not able to work for themselves, and then the workers were permitted to turn to their own tracts. Lastly, the army of laborers cultivated the land set aside for the support of the imperial government, and according to an ancient chronicler they made of their task a festive occasion, chanting ballads in praise of the Inca as they worked. Thus no favoritism was permitted in working on the land. Individuals were given for their own use the products of the fields assigned to them; and as an insurance against famine, there was in every village a storehouse filled with emergency supplies of food.

As a result of popular need, coöperation, and skilled supervision, the Incas were far better agriculturists than their Spanish conquerors of the sixteenth century. They built terraces (later called by the Spaniards *andenes*, or platforms) up the steep mountain slopes, holding them firmly in place with neatly built stone walls; and upon these they planted crops, thus adding to the productivity of the land. The soil was fertilized with guano; and when necessary it was drained of surplus water or supplied with needed moisture by irrigation. In the latter case the water was often carried by canals or aqueducts for great distances. Even the natural meadows in the high Andes, upon which grazed the llama and alpaca, were irrigated at times.

There were vast herds of these animals; but they belonged exclusively to the government and the religious establishment. A portion of them were slaughtered annually to help toward supplying meat for the court and for the higher classes in general; but the rank and file were largely restricted to vegetable diet. It was illegal to kill privately the guanacos and vicuñas, the wild kindred of the domestic animals mentioned; but periodically there were public hunts, or drives, in which many thousands of people, aided by dogs, took part. On these occasions great numbers of the animals were caught by means of nets, traps, and the bolas. Some were killed, but most were freed after being shorn. The fine, silky fleeces of the vicuña were the special lot of the Inca; but the coarser wool went into the common supply, to be placed in the storehouses or else distributed among the families according to their need. In the same way the fleeces of the llamas and alpacas were stored or distributed after shearing time. The weaving was done by the women, who usually worked in their own households; but the garments for the soldiers and the helpless were made by women tributaries who were gathered into special houses and required to devote the whole of their time to spinning, weaving, knitting, and sewing. Apparently the cotton used in the lowlands for garments was distributed and worked up in the same manner.

To prevent interruption of the national labor machinery by family festivals, private weddings were not permitted among the masses. Instead, once a year (according to Garcilasso de la Vega) the marriageable young people were assembled in the city squares and paired off by joining hands after the consent of the parents had been secured and, in some cases at least, the wishes of the brides and grooms had been considered. When every eligible person had been matrimonially disposed of, there was "one universal bridal jubilee throughout the empire," accompanied by dancing, singing, and playing upon pan pipes, flutes, drums, and other simple musical instruments. When the national wedding celebration had ended, all returned to their labors.

Such, in broad outline, was the paternalistic system of the Incas. Its virtues were numerous. Graft and corruption seem to have been almost unknown. Broadly speaking, there was no wholly leisure class and there were no overworked drudges; no one starved, and no one squandered; no able-bodied person was permitted to be idle, since there was work for each; no one might beg, since provision was made for all. But there were serious flaws in the system. The humble were discriminated against in various ways, whereas the upper classes enjoyed privileges and exemptions. The former had absolutely no opportunity to rise, for they were expected to walk in the paths in which their fathers had trod. Submission and implicit obedience to his betters were the cardinal virtues of the common man; ambition and progress were not for him.

Yet the lowly folk in the Inca empire were probably no worse off, all things considered, than were the serfs and peasants in many countries of Europe at the time.

The architecture of the Incan period was simple and solid, with much less decoration than most of the earlier cultures displayed. The majority of the population lived in simple huts much like those of the humble among the other aboriginal peoples, but the temples and palaces in the highlands—the most advanced part of the Inca empire—were of wrought stone, usually granite. It was in the cutting and fitting of the stones for their buildings that the Incas showed their greatest mechanical ability, for in this they surpassed all other peoples. In their earlier structures no attempt was made to reduce the stones to uniform size or to lay them in courses. Each stone was simply shaped sufficiently to fit into a given part of a wall, a method which resulted in something of a crazy-patchwork effect. In the wall of a house in Cuzco may still be seen a large stone showing twelve different angles. The stones were fitted so perfectly that not even a knife blade could be slipped between them; and no mortar of any sort was used. In some of the Incan structures used for fortifications very large stones weighing several tons were thus carefully fitted into their places. In the later period of the Inca empire the stones were cut into quadrangular shape and laid in courses. As a rule the buildings were of but one story; sometimes they were arranged about a court. The walls were very thick and of solid stone, partly to guard against wrecking by earthquakes. Stone slabs, straw, or reeds formed the roofs. Windows were used to some extent and were placed rather high in the walls. Doorways were sometimes set back in niches and were narrower at the top than at the bottom. The Inca architects used no form of arch, but they sometimes employed pillars in the buildings. There was little attempt to decorate the outsides of the structures; but occasionally the lintel stones were carved in a simple, strong bas-relief design, cornices were decorated, or (as in the case of various houses still existing in Cuzco) a more artistic effect was secured by rounding off the corners formed by the junction of the outer walls. In rare instances greater ornateness was sought, however, as is clear from the fact that when the Spaniards arrived there were in Cuzco at least two houses covered with gold plates.

The people of the Inca empire were also able metallurgists, familiar with all the processes of working the softer metals, and showed considerable artistic ability in making articles of bronze, silver, and gold. The gold decorations and images of the great temple of the sun in the capital were especially fine and were so abundant that the place was called the Gold House. In the gardens of one of the Inca's palaces were models in gold and silver of all sorts of plants and flowers, says Garcilasso, "some just beginning to sprout, others half grown, others having reached maturity."

Closely associated with the goldsmiths and silversmiths, yet a separate class of craftsmen, were the jewelers, skilled in cutting, polishing, and setting amethysts, emeralds, and other stones.

The work of the Incas in clay was not as ambitious as that of their Nasca and Chimu predecessors: it did not attempt the intricate, richly colored designs of the one or the realistic sculptures of the other; but in simplicity and purity of form it excelled both. Some of the best Incan vases show a restrained taste suggestive of ancient Greek work. The patterns painted upon the pottery reveal that the Inca artists were able designers and colorists, but the sculptural work of the vases is better than the painting. Portraiture also was attempted in pigments upon boards or cloth, and included likenesses of the emperors and other noted men; but there appear to have been few plastered interiors to tempt the fresco artist. Instead, tapestries and feather mosaics were used for decorating the walls of temples and palaces, and showed decided skill. The former were woven in intricate patterns or embroidered in varied designs with rich colors; the latter, made by arranging on a cloth background a design from brilliant bits of birds' plumage, were more ambitious in subject than the textile hangings, as well as usually more gorgeous in effect. Portraits of the Inca himself were made in feather mosaic.

As was to be expected in an oligarchic despotism like the Inca empire, no provision was made for general education. The aim, on the contrary, was to keep the masses ignorant. In the view of one of the most noted of the emperors, "Science was not intended for the people, but only for those of generous blood. Persons of low degree are only puffed up by it, and rendered vain and arrogant." Accordingly the schools were limited to the children of the nobles and were intended to train them for public office and for the professions. The teachers, known as *amautas*, or wise men, were of the priestly class. They gave special training in law, priestcraft, or the principles of government, according to the career desired by the pupil; but they also taught the elements of science, the Quechua tongue (which was the language of the Incas and the official one of the empire), the chronicles of heroes, religious poetry and songs, and the use of the *quipu*, which took the place of writing in the realm of the Incas.

Quipus were fringes of knotted threads of different colors and length, and were chiefly used to record numbers and simple facts connected with the numbers. Apparently a decimal system was employed, the units being represented by the lowest knot on the fringe, the tens by the next knot above, and so on. The colors had a symbolic meaning as well as a literal one; thus, red stood for war, and white for peace. By use of the quipus in the hands of special officials, financial accounts, army rolls, census reports, and other statistical information were accurately recorded and preserved.[1] They appear to have been used also somewhat after the manner of a syllabus, for preserving the outlines of history; and so satisfactory did they prove as a method of recording thought that no system of picture-writing developed among the Incas or their kindred of the southern Andes.

Just how much scientific knowledge the Inca scholars possessed is not easy to say, but they certainly had made beginnings along various lines. That they were expert arithmeticians their use of the quipu shows, and the construction of their buildings reveals a knowledge of elementary geometry. They had also learned the curative properties of a large number of plants, and regularly used this medical knowledge. They practiced surgery, including trepanning and the filling and replacing of teeth. Naturally the Incas, as "children of the sun" (as they called themselves), were much interested in astronomy; and they had made considerable progress in it. They had named a number of planets and were familiar with their motions, and were able to determine the arrival of the equinoxes and solstices. June 22, the beginning of the winter solstice, was the first day of their year, which consisted of twelve months of thirty days each and an additional five days—except quadrennially, when a sixth day was added in order to keep the calendar in harmony with the solar year.

Religion, as would be expected from the divine character of the ruler, played an exceedingly important part in the Inca empire. The gods were exceedingly numerous here, as elsewhere among the advanced aborigines; but in the popular view the sun was the greatest of them all,—a fact easily explainable by the cold, bleak atmosphere of the high plateau. Among the Incas and other advanced thinkers, however, there was another deity yet more powerful who had made the sun and all things else. This god, called in the Quechua by the name Pachacamac (He who animates the universe), was identified with an earlier pre-Incaic deity, Viracocha; and the names are therefore interchangeable. This being was thought to be wholly spiritual and invisible and was consequently represented merely by a symbol in the form of an elliptical gold plate set in the temple wall.

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[1] Herdsmen of the remoter parts of Peru still use quipus of a simplified sort to keep a record of their flocks.

Every town and city had its richly furnished temples where a numerous caste of priests and diviners gave their attention to religious duties of various kinds. The pontiff of the hierarchy was a member of the royal family and ranked next to the emperor himself. Connected with the temples of the sun, which were the most magnificent of all, were groups of virgins whose principal duty was to keep the sacred fire burning upon the altars.

As among the Aztecs, the religious system of the Incas included fasting, prayer, sacrifice, religious feasts, confession, and penance. Usually the offerings to the gods, even to the sun himself, were vegetables, fruits, flowers, precious metals, plumes, or woolen garments, all of which were burned on the altars; but at periods of special religious significance, such as the summer solstice, llamas were offered to the sun god, and events of importance, such as military victories, were celebrated by sacrificing human beings, generally children.

The method of approach to the deity and the prayer to him depended upon his rank and functions. Special reverence was indicated, says Garcilasso de la Vega, by "bowing the head and the whole body, raising the eyes to heaven, stooping to the ground, raising the hands and opening them, and kissing the air." It was in this way that respect was shown to Pachacamac, the sun, and the emperor, who was the child of the sun. The priests also greeted the rising sun with kisses thrown from the finger tips.

To the rank and file of the nation, according to Rafael Karsten, the Inca was the living, human representation of the sun—he was their god who had been made flesh and dwelt among them; hence they felt that the fates of the sun and the Inca were bound up together. Since they dreaded the dark and the cold and the possibility of being deprived of their paternalistic despot who arranged for all their needs, they prayed fervently that life, health, and strength might be preserved to the sun and the emperor. "May you never grow old; may you ever remain young; may you rise every day illuminating the earth!" was one of the invocations addressed to the sun.

To Pachacamac, the creator god, who dwelt "in the heights of heaven and the storm clouds," fervent words of praise were uttered and of varied petition, from requests for bodily needs to the gift of eternal life. Some of the prayers to these high gods are in their nobility of thought suggestive of the psalms of the Hebrews.

III

THE MAKING OF THE HISPANIC PEOPLES

There was crying in Granada when the sun was going down;
Some calling on the Trinity—some calling on Mahoun.
Here passed away the Koran—there in the Cross was borne—
And here was heard the Christian bell—and there the Moorish horn.

"The Flight from Granada," from *Ancient Spanish Ballads*
(translated by J. G. Lockhart)

THE DIFFERENTIATING INFLUENCE OF GEOGRAPHY

WHILE aboriginal groups rose and fell in the Western Hemisphere and their cultures waxed and waned, in a corner of Europe were developing two peoples, the Spaniards and the Portuguese, destined to break the aborigines' monopoly of the Western lands and to bring to them a new era and a new culture. Hence it is necessary to give some consideration to the personal characteristics, traditions, and institutions of these invaders; and these can be understood only through a backward look at their history.

Their history was, in turn, much conditioned by the geography of the Iberian Peninsula, in which they lived. It should therefore be noted that the Pyrenees, along the northern border, formed a partial barrier until modern times, discouraging contact with the rest of Europe and preventing a strong, continuous influence from that quarter. At the extreme south, on the other hand, the Peninsula is set off from Africa by the Strait of Gibraltar, less than twelve miles wide, which has proved no real obstacle to human comings and goings. Throughout all history people have moved freely across this narrow waterway between the lowlands of northern Africa and those of southern Spain, which form a geographic unit.

Within the Iberian Peninsula itself, however, exists much geographic diversity, resulting in marked differentiation among the inhabitants. The interior, from the Cantabrian Mountains at the north to the Sierra Morena in the south, is occupied by a plateau from twenty-six hundred to twenty-seven hundred feet in height, broken by still loftier table-lands and other mountain ranges. This plateau is tipped toward the southwest, causing four of the largest rivers of the peninsula—the Douro, the Tagus, the Guadiana, and the Guadalquivir—to flow into the Atlantic. The other large stream, the Ebro, rises in the Cantabrian ranges and travels southeast into the Mediterranean. Practically everywhere, except in the south, the drop from the elevated interior to the coastal plains is an abrupt one, causing the rivers to cut deep gorges and sharply setting off the highlands from the lowlands. Each river valley is likewise a distinct unit, separated from its neighbors by well-marked mountain ranges. These numerous topographical compartments of the Iberian Peninsula helped to develop in the people inhabiting them a spirit of localism and separatism persistent even today.

Climate also played a differentiating part, for the region includes four well-marked climatic zones. In the central tableland and the upper valley of the Ebro are found the greatest extremes of heat and cold; even in summer the nights are often sharp, while the days are oppressively warm. The air is very dry, and there is much wind. Winter is the wet season; summer is virtually rainless. The northeastern slope forms a second climatic area, showing moister air and less extreme heat and cold than the plateau. The coastal region stretching southward from the Sierra Morena is subtropical, closely akin to the African coast across the strait. It is an almost frostless region of hot, rainless summers and, in the eastern part, occasional scorching winds. In the north and northwest the climate is mild but fairly bracing, and almost ideal according to temperate-zone standards, though the rainfall is rather excessive in some parts.

In the Iberian Peninsula the differentiating influence of geography has operated for thousands of years upon an increasing number of originally unlike human groups; for Spain and Portugal are among the most racially heterogeneous countries in the world. Intermarriage and the social mingling of different elements within the same geographic units have resulted in considerable blurring of the sharp lines between ethnic differences; but even today the Peninsula is divided into population groups that are marked by the physical and mental characteristics of the various racial elements which in the course of past ages have found their way into it.

EARLY INVASION OF THE IBERIAN PENINSULA

The earliest known inhabitants of the region were a long-headed brunette people of short stature, members of the so-called "Mediterranean" race. They were a part of the wave of dark, rather mysterious people known as "Iberians," who settled in western Europe before the dawn there of written history and probably were closely related to the Berber tribes of northern Africa. Although unfamiliar with the use of metals, they knew well how to shape implements and weapons by cutting and polishing stone. Their shelters were to some extent natural holes in the ground, as is shown by the souvenirs in the shape of excellent drawings and paintings of wild animals which they left upon the walls of caverns in northern Spain.

Still within the period of prehistoric darkness, there came from the north another important ethnic element—the Celts, a tall, blond people, who struggled with the Iberians and to some extent merged with them (forming what the Romans called the Celtiberians, of the north-central part), but remained fairly pure-blooded in the northwest of the Peninsula. They were more advanced in the mechanical arts than their predecessors and knew how to smelt and shape the iron ore and other metals abounding in the region.

Perhaps as early as the eleventh century before Christ, came a Semitic people from the East—the energetic and aggressive Phœnicians. But they largely restricted themselves to the coast, where they built (especially in the south and southeast) a number of trading posts, apparently including one called Gadir (Stronghold), later known as Cádiz. Their primary interest was commerce. From the Peninsula they carried into the eastern Mediterranean agricultural products, fish, and various metals —gold, silver, copper, tin, and quicksilver; and they gave to the Celto-Iberian westerners in return (to a considerable extent in the form of material imports) the seeds of a superior culture.

Some centuries later than the Phœnicians the Greeks came, likewise as traders, and established themselves for the most part in the northeastern portion of the Peninsula. But they also kept to the coast, where they dwelt in walled harbor cities and made no attempt to conquer the inhabitants of the interior with whom they carried on commerce.

After the decline of Phœnicia in the sixth century B.C., Carthage, its colony in northern Africa, expanded and for a time flourished greatly. Carthage conquered Cádiz and other early settlements in Spain, built new cities (including Carthago Nova, later known as Cartagena), and occupied most of the southeastern coast of the Iberian Peninsula. In the struggle between Carthage and Rome the former drew heavily upon the wealth of its new colony and recruited soldiers from there. As a result of the Second Punic War, Carthage fell in 206 B.C., and Rome gained a dominance in the Peninsula which it retained for six centuries.

The Romans were the first people to conquer the whole territory between the Pillars of Hercules and the Pyrenees and to stamp it with their characteristics. The region, called Hispania, was divided for administrative convenience into northern and southern parts, each of which was headed by a Roman official. Roman law was introduced, and here and there Roman citizenship was granted, especially to the cities that had yielded readily to the invaders. While the old centers were gradually Romanized, new ones grew up around the army camps. For military purposes the conquerors united the remote rural districts with the urban centers by means of excellent roads, some of which are in use even today. Handsome and substantial public and private edifices, aqueducts, theaters, and other material monuments to Roman culture were built throughout the Peninsula. The rich mines were worked more extensively than ever before, agriculture was conducted more scientifically and was greatly expanded, and industry and commerce flourished. Latin was adopted as the written and spoken language, and Roman thought became the thought of Hispania to such a degree that in the first century of the Empire, which began in 27 B.C., that western peninsula was perhaps the most Roman part of Rome's dominions. During this period, known as the literary silver age, many of the most enthusiastic and important Latin writers were born in Spain, and at least one of them, Martial, appears to have been of Celtiberian blood.

For a time Jupiter, Mars, Minerva, and other Roman deities were worshiped by the conquered Spaniards in addition to some of their own gods; but Christianity was introduced at least as early as the second century and was in a position of great strength before the close of the fourth. At first, while it was weak, it was on the defensive, but after gaining an official position it became intolerant; hence the Jews, who had come into Spain in considerable numbers after the destruction of Jerusalem by the Emperor Titus in A.D. 70, began in the fourth century to suffer from religious discrimination.

By the first years of the fifth century the military and political decline of Rome made it possible for the Suevi and Vandals, Germanic barbarians, and the Alans, a Turanian people, to invade Spain across the Pyrenees. Though not very numerous, they wrought much disaster and inspired terror by wandering through the Peninsula looting cities and levying tribute. About the year 412 came the Visigoths, at the invitation of the local Roman authorities, who, in consequence of their reduced military forces, could not cope with the invaders. These energetic Germanic allies of the Romans forced the Suevi to retire into the extreme northwest of the Peninsula and apparently wiped out most of the Alans. But the Vandals, after playing a part, albeit a minor one, in the chronic turbulence which soon held sway in Spain, departed permanently in 429 under their leader Gaiseric, and conquered a kingdom for themselves in Africa.

The Visigoths, however, became more and more deeply involved in Spanish affairs. After responding to the Roman call for help they withdrew to the kingdom which they had established at Toulouse, beyond the Pyrenees; but the crumbling of the imperial power caused them to intervene repeatedly, ordinarily as allies of one of the various factions struggling for supremacy in the Peninsula. An increasing number of Visigoths settled there as time passed, and in the latter half of the fifth century the Visigothic leaders became dominant. But during the first century of the Visigothic kingdom of Spain the men at its head gave at least nominal allegiance to the Eastern Empire.

This period was one of extreme turmoil, decentralization, and general retrogression, a condition partly due to religious differences; for the Visigothic conquerors, who were numerically inferior in the population as a whole, were heterodox Arians, whereas the Spaniards (and, later, the Suevi, who had formed a small separate state in the northwest) were Catholic Christians, with a well-organized clergy and backing from the bishop of Rome. Furthermore, in the almost incessant politico-religious wars which ravaged the Peninsula until late in the sixth century the orthodox element usually had aid also from the Frankish kingdom and the Eastern Empire, both of which were Catholic. On the whole the Goths were worsted, and gave way north of the Pyrenees to the Franks, and in Andalusia to the Byzantine forces. Finally Reccared, the reigning Visigothic king, decided that it would be highly expedient politically to change his religion. Hence, at a Church council held in Toledo in 587 or 589 he formally became a Catholic. Subsequently he worked with fair success to induce his people to follow suit. By this move the Visigothic minority secured the support of the Church hierarchy and greatly strengthened its position.

Throughout its history, however, the Visigothic kingdom of Spain was politically weak and was characterized by a semi-feudal anarchy. This was due in part to the fact that the kingship was elective,—an arrangement which the ambitious, quarrelsome nobles aimed to continue to their own advantage. In the seventh century the office was made quasi-hereditary through being restricted to one family, but the position of the king remained weak. In administering the affairs of the country, in formulating decrees, and in his appointment of officers for the towns and provinces he acted with the advice of councils made up of lay nobles and Church officials. Religious matters, however, were the special concern of Church councils. In the main the administrative machinery imitated the Roman system; but it was a weak imitation.

The internal disorders making life and property insecure resulted in a sharp economic decline: agriculture was neglected and became less scientific than under Roman rule, manufacturing also deteriorated, and there was a falling off in the value of exports.

The Gothic conquerors, like the Normans in England, formed, on the whole, the aristocratic upper stratum of society and owned most of the soil; but many Romans were persons of prominence. The humblest folk were the slaves and the serfs, both of whom were mostly descendants of the pre-Roman inhabitants of the Peninsula. Between the upper and lower groups were merchants, artisans, and professional men, largely Roman and Gothic. By a clause in the Theodosian Code of the fifth century, marriage between Goths and Romans was prohibited; but after the former had become the nominal leaders in Spain the law was largely ignored, and was finally abolished. There were also separate laws for conquerors and conquered until the middle of the seventh century, when the *Lex Visigothorum* (also known as *Fuero Juzgo*) was adopted for the population as a whole. As was to be expected, this was a combination of Gothic and Roman laws; but the latter were dominant. The throwing down of the legal walls between the two ethnic elements fostered the fusion of victor and vanquished. As a result, the Goths were conquered by the Roman cultural characteristics, and a corrupted Latin became the spoken language of all the inhabitants.

After all, the chief contribution made by the Visigoths and their Germanic kindred who preceded them into Roman Spain was themselves; for they brought into this decadent part of the empire a new, energetic racial element which was badly needed and which made itself a great force.

THE MOHAMMEDAN CONFLICT

But this result was not apparent until a much later time, for early in the eighth century Spain's openness to the south proved fatal to the Visigothic kingdom. Already armies of Mohammedan Arabs had swept westward across the Isthmus of Suez and into North Africa, spreading their faith by the sword. The remnant of the Vandals yielded before their power, and also the Berbers, who became even more devoted followers of Islam than their conquerors. By 710 the Mohammedans had established themselves in Morocco.

Just across the strait was Spain, a tempting and easy prey, partly because two factions were at the time struggling for the throne. But there was also disaffection on the part of the Jews, who had been free from oppression while the Visigoths remained Arian, but who, with the conversion of Reccared, began to be persecuted anew, until now these unfortunate exiles were in a state of desperation. According to the old accounts one of the Spanish political factions, and the Jews as well, besought the aid of the Mohammedans. They came; and the name of their fanatical Berber chieftain, Tarik, is still applied to the bluff where he landed his forces—Gebel-al-Tarik, Tarik's Mount, or Gibraltar. The invaders placed weapons in the hands of the Jews, who labored zealously to overthrow Christian control in the Peninsula. On July 19, 711, a decisive battle took place which resulted in the defeat of Roderic, the Gothic king of Spain, and the cutting of the weak political ties which had given the land a semblance of unity. The invading forces marched northward, meeting with little resistance, and within a few years they were in control of the whole Peninsula. In 718 they crossed the Pyrenees and proceeded to overrun the Frankish dominions; but their advance was ended near Poitiers, where, in 732, they met decisive defeat at the hands of the allied Christian armies led by Charles Martel.

Among the Mohammedan conquerors in Spain the Arabs were politically dominant, and their terms to the vanquished were fairly liberal. Since their object at this time was more to add to the glory of the Caliph by extending his dominions than to convert the infidel, they did not at first seriously attempt to force Islam upon the Spaniards, and they also permitted them to live under their own laws. Indeed, in Mohammedan circles there was some opposition to converting the conquered, since this reduced the income from the poll tax levied upon all non-Mohammedans and resulted in heavier financial burden for Moslems. However, though the Christian Church was tolerated, it was greatly limited from the very beginning of Mohammedan control, and occasional attempts were made to suppress it, partly because of fanatical attacks by Christians upon Mohammedans and partly because of the religious enthusiasm of Moslem rulers. As the centuries passed, many of the conquered did decide to change their religion, acting in some cases from honest conviction, and in others from a desire to escape religious persecution or the discriminatory poll tax or to secure emancipation from slavery; for freedom was offered to all who accepted the new faith. The Jews, whether or not they became Mohammedans, fared much better under the changed order: their persecutions ended, old prohibitions were removed, and they were admitted to administrative positions as well as to all occupations, in these regards being shown preference over the Christians. The Moslem era was really the golden age of the Jews in Spain; during this period they greatly increased in numbers owing to the immigration of those who fared badly in other lands.

For a short time Spain was nominally ruled from far-away Damascus, the seat of the Mohammedan caliphate. However, after a bitter struggle between two rival dynasties, the Omayyads and the Abbasids, for control of the central authority, Abd-ar-Rahman, a member of the defeated Omayyads, made his way to Spain, where in 756 he set up at Córdova an independent caliphate. Under Abd-ar-Rahman I and certain of his successors the Peninsula flourished remarkably in almost every way. Nevertheless the Moslem period, like the Gothic, was one of political weakness and much confusion. From Africa came new groups of peoples, generally Mohammedan in faith but racially varied,—Arabs, Syrians, Egyptians, Berbers, and Jews,—who struggled with the rulers of Spain to gain control of the government. Sometimes the new invaders were driven out or conquered; sometimes they became dominant. Part of the conflict within the Peninsula came from religious differences between the Moslems themselves, and part of it from increasing antagonism between the adherents of the Prophet and their Christian subjects.

Culturally the Semitic Oriental followers of Islam were far ahead of their African converts, who, however, gradually assimilated many characteristics of their conquerors. For nearly eight centuries the Iberian Peninsula was much under Mohammedan influence. To it was then given the Oriental stamp which differentiates Spaniards and Portuguese from other peoples of western Europe. During much of this period Mohammedan Spain was in many regards more advanced than the Christian states of Europe; it developed both materially and intellectually.

Agriculture was revived and reached a level above that of the Roman times. Extensive irrigation systems were built; worn-out fields were restored by means of fertilizers; the science of grafting was introduced; various new economic plants, including rice, sugar cane, and cotton, were brought in; also silkworms, with mulberry trees for their food; and soon the weaving of handsome silks became an important industry, particularly in Córdova. The yield of the mines increased greatly, and work in metals (notably iron) vied with that of Damascus in its excellence. The Peninsula also became famous for its beautiful glassware, pottery, jewelry, and carved leather and ivory. These artistic products, together with other manufactured and raw materials, were carried by national and foreign traders all over Europe and even found their way into Africa and Asia.

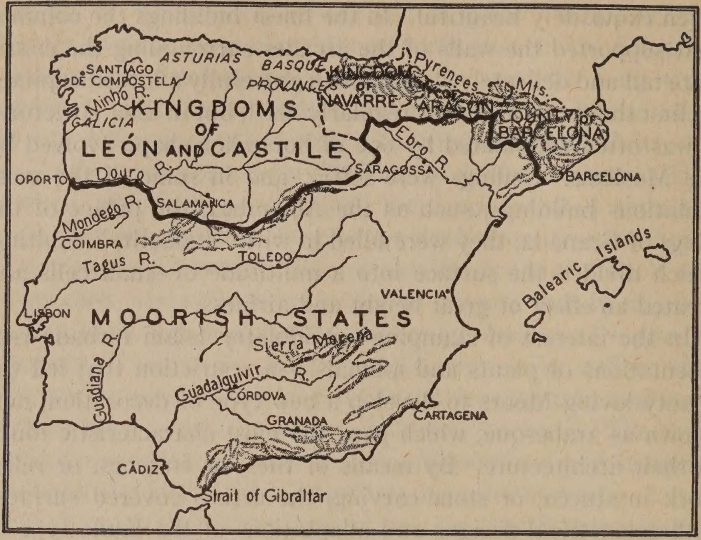
Córdova was the cultural capital, just as it was the political capital. Arabic took the place of Latin as the language of scholars, and was used even by the Jews, who competed with the Arabs for preëminence in intellectual pursuits. From the Chinese the Arabs appear to have learned how to make paper from vegetable fibers. They introduced this knowledge into Spain, establishing there the first paper factory in Europe. As a result of this priority in the use of paper, books became cheaper and far more abundant in Spain than in the Christian north, where parchment continued to be used for some time. Libraries multiplied to such an extent that in Andalusia alone seventy different ones are said to have existed. The library begun in the tenth century in Córdova by Abd-ar-Rahman III is credited with having contained about six hundred thousand books and was perhaps the greatest intellectual treasure house of its time in the world. The caliphs also founded schools and universities, and education became so popular that in no other country of western Europe was literacy so common. Despite the existence of polygyny and the harem, women as well as men were given opportunities for intellectual development, and some of them became distinguished in letters and science. The earliest writings of the era were mostly philosophical and imaginative, the latter largely taking the form of poetry and song. Later, under the leadership of the Jews, interest in scientific investigation became keen, and it was pursued quite unrestrained by religious prejudice. Spanish physicians and surgeons came to be known as the best in Europe. Chemistry attracted many, and new discoveries were made in that field. Pharmacy, botany, and astronomy were regular branches of study in the universities, as were also arithmetic, algebra, and trigonometry; and to the development of mathematics Spanish Moslems made notable contributions.

Mohammedan architecture took on new lines in Spain. The Arabs brought with them from the Orient the plain, almost severe style of domed building inspired by later Roman and Byzantine models, of which the great mosque at Córdova is typical; but in the West they evolved the characteristic Spanish Moorish style, noted for its warm, rich beauty. On ordinary buildings the roofs were of red terra-cotta tiles, which generously splotched the landscape with mellow color; but for large public structures the dome was retained and was combined with features giving the whole edifice a lighter, more graceful effect. From the street many of the buildings often appeared plain, even forbidding; but the interiors, built around Oriental courts where fountains played, flowers bloomed, and birds sang, were often exquisitely beautiful. In the finest buildings the columns that supported the walls of the arcades surrounding the courts were tall and delicately slender, with gracefully adorned capitals. At first the round arch was regularly used, but in later structures it was often supplanted by one of horseshoe shape evolved by the Moslems. Ceilings were lofty; and in some of the most ambitious buildings, such as the Alhambra, the palace of the kings of Granada, they were filled in with "stalactite" vaulting, which divided the surface into a multitude of small cells and created an effect of great height and airiness.

In the interest of stamping out idolatry Islam forbade representations of plants and animals,—a restriction that led the beauty-loving Moors to develop a new type of decoration, now known as arabesque, which gave the most characteristic touch to their architecture. By means of tiles, or frescoes, or relief work in stucco, or stone-carving, the artists covered surfaces with geometrical designs and adaptations of the Kufic type of Arabic inscriptions so exquisitely delicate and gracefully intricate as to resemble fine lace or dainty filigree. When pigments were used, blue, black, and yellow were favorite colors for the arabesques, and were especially common in the glazed tiles, which were employed not only for decorating walls with dadoes and friezes but often for floors and domes as well. With the passage of time came greater elasticity in the interpretation of the Koran; and Moorish decorators introduced into the arabesques conventionalized figures of plants and animals and even carved them in the round, as is illustrated by the stone figures of lions in the famous Court of the Lions in the Alhambra. Notwithstanding this modification, however, the architectural ornamentation of Moorish Spain preserved in general its unique features and pleasing effect.

THE REVIVAL AND DEVELOPMENT OF CHRISTIAN SPAIN

While the Mohammedans were creating in the Iberian Peninsula a rich, superior culture original in character but allied to the Oriental, in the north were emerging a number of Christian


ASTURIAS
SANTIAGO DE COMPOSTELA
Minho R.
GALICIA
KINGDOMS OF LEÓN AND CASTILE
BASQUE PROVINCES
KINGDOM OF NAVARRE
Pyrenees Mts.
KINGDOM OF ARAGON
COUNTY OF BARCELONA
Ebro R.
SARAGOSSA
BARCELONA
OPORTO
Douro R.
SALAMANCA
Mondego R.
COIMBRA
Tagus R.
TOLEDO
VALENCIA
Balearic Islands
LISBON
MOORISH STATES
Guadiana R.
Sierra Morena
Guadalquivir R.
CÓRDOVA
GRANADA
CARTAGENA
CÁDIZ
Strait of Gibraltar

THE IBERIAN PENINSULA IN 1037

states destined ultimately to dislodge Islam completely from the whole area lying between the Pyrenees and the strait. After the defeat of the Visigoths by the invading Moslems in the eighth century, some of the former took refuge in the remote fastnesses of the northwestern mountains and became the leaders in the Christian reconquest of the Peninsula. The earliest of the states to be established by these refugees was Asturias, the first king of which was Pelayo, a half-legendary figure. Later rose Galicia, León, Castile, and various other separate political units under the lead of the Spanish-Gothic party. To the east of Asturias were the Basques, a people of undetermined origin, but believed by some students to be pure-blooded descendants of the primitive Iberians. They were a liberty-loving folk, unusually sturdy in character, and differed from their neighbors not only in manners and customs but in their speech, which formed a language family by itself. The Basques were conquered and Christianized by the Romans; but they seem to have retained their independence against both the Germanic invaders of the fourth and fifth centuries and the Moslem hosts that entered the Peninsula three hundred years later. Part of this Basque element later went to form the state of Navarre, which lay across the Pyrenees and was long a bone of contention between France and Spain.

These weak Christian states of Spain were incidentally aided against the Mohammedans by their Frankish neighbors. In 778 Charles the Great crossed the mountains and advanced as far south as Saragossa, making war upon the followers of Islam. Later his conquests were organized as the Spanish March, the fortified frontier of which had by 811 reached the Ebro River, thus furnishing to the Spanish Christian states much protection on the east from the Moslem enemy. In the stormy days of Louis the Pious the March was formed into the county of Barcelona, or Catalonia, but it remained tied to the Frankish kingdom politically until late in the ninth century, when it declared and won independence. Then the counts of Barcelona turned the tables by extending their boundaries northward at the expense of the weak French kings, but by the middle of the thirteenth century they had again lost these northern conquests. More than a hundred years before this, however, Catalonia, through marriage between the reigning families, had become united with the little kingdom of Aragon, its neighbor to the west.

In their long warfare against the Moors the Christian states of the north were often allied; but they freely quarreled among themselves in a highly unchristian manner, and repeatedly they asked and received aid from the Mohammedans against their coreligionists. This lack of unity and solidarity greatly retarded the reconquest: the Christian frontier line made many long pauses and repeatedly wavered and receded; but on the whole it advanced southward at the expense of the Moslems. In this aggressive conflict the northwestern states, founded by Visigothic refugees or their descendants, were more zealous than those to the east; and from the outset the clergy played an important part in stimulating the struggle. In the ninth century a bishop was reported to have found in a wild, remote part of Galicia a tomb containing the body of the apostle St. James the

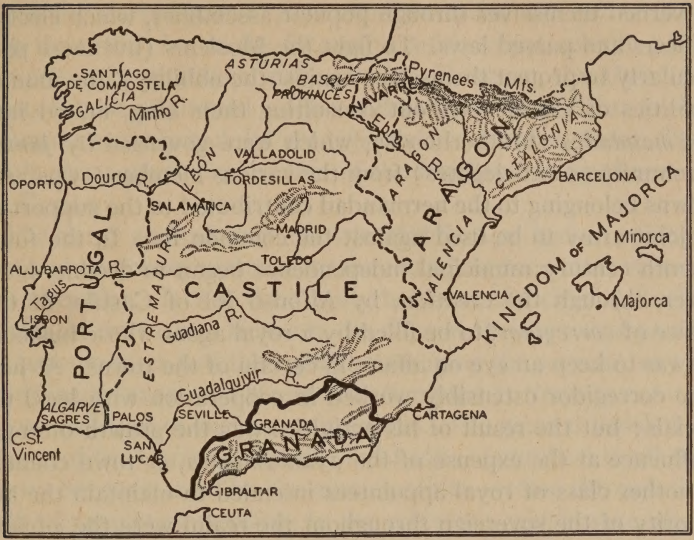
Greater. This alleged discovery rendered rare service through galvanizing the Christian north into a more vital religious unity. To the shrine built for Santiago (that is, St. James) at Compostela flocked endless throngs of devout pilgrims. Miracles were wrought through the intervention of the saint, who was seen by the devout leading the Christian hosts against the enemy. Soldiers marched behind consecrated banners shouting their new battle cry, "Santiago! Santiago!" The war of reconquest thus became a crusade. Consequently intolerance and fanaticism increased among the Christians and were reciprocated by the followers of Islam, making more bitter the relationships between the two.

In the eleventh century the breaking up of the caliphate of Córdova into a number of weak, quarreling states encouraged and quickened the elimination of Moslem control. By 1266 the Mohammedan territory had been reduced to one small state of the southeast coast of the Peninsula—Granada, tributary to Castile.

Along with military conquest went political consolidation by the Christians. Asturias, Galicia, and some lesser states were absorbed by the two kingdoms of León and Castile; then these had united and, as a result of various accretions, now extended from the far northwest to the Strait of Gibraltar. The Basque provinces, however, remained independent for a century longer. To the east was the kingdom of Aragon (made up of Aragon proper, Catalonia, and Valencia), which spread from the Pyrenees almost to Cartagena. Occupying the Atlantic slope to the southwest was Portugal, the development of which will be considered later.

For more than two hundred years after these political conditions had been reached the Christian states made no serious attempt to end Moslem rule in Spain; but by agreement Castile guarded the strait against new invasions and was free to expand into Africa and the western islands, while Aragon satisfied its warring instincts and political ambitions by activities beyond the Pyrenees and in the Mediterranean.

From the beginning of the reconquest to the accessions of


SANTIAGO DE COMPOSTELA
GALICIA
Minho R.
ASTURIAS
BASQUE PROVINCES
NAVARRE
Pyrenees Mts.
LEON
VALLADOLID
OPORTO
Douro R.
TORDESILLAS
SALAMANCA
MADRID
TOLEDO
ALJUBARROTA
Tagus R.
CASTILE
LISBON
PORTUGAL
ESTREMADURA
Guadiana R.
Guadalquivir R.
ALGARVE
SAGRES
PALOS
SEVILLE
GRANADA
GRANADA
C. St. Vincent
SAN LUCAR
GIBRALTAR
CEUTA
CARTAGENA
ARAGON
ARAGON
CATALONIA
BARCELONA
VALENCIA
VALENCIA
KINGDOM OF MAJORCA
Minorca
Majorca

THE IBERIAN PENINSULA IN 1491

Isabella and Ferdinand in the latter half of the fifteenth century, many important developments took place in the institutions and the policies of the Christian states. To them some attention must be given here, especially to those of Castile, for they, in particular, formed the bases of the Spanish colonial system. One very important change was that which took place in the towns. Upon the lands laid waste by the Mohammedans as they retreated southward the Christians built castles (whence came the name—Castile—of the state which rose in the recovered area) and reënforced them with military colonies. To get settlers for these exposed frontier towns (or *villas*, as they were called) the kings offered special inducements. All unfree persons coming within their limits were given liberty, and to the towns was accorded the right of self-government, which resulted in their being for a time virtually independent even of the sovereign himself. Most of the old cities also gained liberal charters during this period in return for aid rendered in the religious wars. The municipalities in the heyday of their liberty usually governed themselves through popular assemblies, which elected officers and passed laws. To fight the Moslems (but more particularly to protect themselves against the nobility), the municipalities of Castile, without consulting their king, united into *hermandades* (brotherhoods), which were governed by *juntas* (committees of delegates) from the various member towns. All towns belonging to the hermandad contributed to the support of a joint army to be used against the common foe. In the fourteenth century municipal independence began to decline, however, through the creation, by Alfonso XI of Castile, of the office of *corregidor*, to be filled by a royal agent whose business it was to keep an eye on affairs in certain of the towns. At first the corregidor ostensibly worked in coöperation with local officials; but the result of his activities was the growth of royal influence at the expense of the *ayuntamiento*, or town council. Another class of royal appointees intended to maintain the authority of the sovereign throughout the realm were the *adelantados*, local officials who in some cases were primarily provincial administrators and in other cases judges; along the frontiers they were, first and foremost, military commanders, but they served also as governors and judges—acting on the advice of magistrates associated with them.

Each of the little kingdoms arising as a result of the Christian reconquest of Spain originally had its *Cortes*, historical descendant of the Visigothic council; but before the opening of the fifteenth century most of the local assemblies in the west had been merged into the Cortes for the united kingdom of Castile and León. In Aragon, however, each of the three component states long retained its local Cortes, though general assemblies were at times called to consider matters of wider importance. For many centuries only church officials and nobles sat in these councils; but the growth in municipal wealth and power caused the towns to be included, and by the close of the thirteenth century every Cortes had its *procuradores*, or delegates from the towns. It rested with the sovereign, however (especially in Castile), to decide which nobles and church officials should be called and which towns should be invited to send delegates.

Originally the selection of their representatives was left entirely with the towns, but in the fifteenth century royal meddling began seriously to influence the choice. However, the Castilian towns in general showed much indifference to their rights in the national assembly and did not coöperate to preserve them. The result was a gradual reduction of the number having places in the Cortes.

The clergy and nobles in the late Middle Ages had no voice in that body in money matters, for they had long been exempt from most taxation. It was the towns that bore the chief financial burden of the realm. Hence in the days of their greatest power the procuradores had the right to pass upon the *servicio*, or extraordinary taxes; and they even attempted at times to control the expenditure of such appropriations. The general legislative powers of the Cortes of Castile and León—permitted to all the estates but most used by the municipalities—came through the right of presenting petitions to the sovereign, which were often granted. On the other hand, the three local Cortes of Aragon had for a time general legislative authority, as well as a voice and vote regarding all extraordinary financial levies. These bodies displayed their greatest solidarity and power in the late thirteenth and early fourteenth centuries, during which the estates repeatedly got the upper hand of the king. They were weaker in the fifteenth century, partly as a result of jealousy and friction between nobles and towns, though they still had more rights than the Cortes of Castile and León.

Two other Spanish institutions developing in the Middle Ages were descendants of the Visigothic council: the *curia*, or royal tribunal, and the king's council. At first an inner group of the Cortes acted in advisory and judicial capacities; but before the close of the thirteenth century a sharp differentiation had taken place, and separate bodies were performing these functions. Men trained in the law were introduced into both the royal advisory group and the royal tribunal, but the former body did not have much importance until the time of Isabella and Ferdinand.

Definite rules were laid down by the Castilian Cortes in 1274 regarding the composition of the royal tribunal. Later this court came to be called the *audiencia*, or *chancillería*, and was divided into separate chambers: one to try civil suits, and the other to try criminal ones. Below the chancillería was a graded system of courts, some of the highest of them presided over by the adelantados, and at the bottom of the scale were the courts of the village *alcaldes*, or justices of the peace.

For the support of the government, systems of taxation were developed, largely taking the place of the earlier feudal payments. The taxes, which in Castile could be levied without the consent of the Cortes, were numerous and included a poll tax demanded of all Jews and Moors, payment of a fraction of the output of all mines (in addition to a royal monopoly of salt), a fraction of the ecclesiastical tithe, customs duties (national and local), and the *alcabala*, or tax on all commercial transactions. Even the nobles were forced to pay the alcabala.

Feudalism was belated in Aragon and never fully developed in Castile, but many of the results of the institution existed to an exaggerated degree in the Spain of the late Middle Ages. This was partly occasioned by the wars of the reconquest, in the prosecution of which the weak rulers found it necessary to win the favor of nobles as well as of municipalities. The most powerful and haughty of the nobles were the *ricos hombres* (later called *grandees*), men of ancient and noble family who at times furnished large armies for the wars, in return for which they were given generous shares of conquered lands. Next to them were the *hidalgos*, the rank and file of the nobility, many of whom in the later period bought their titles, in one way or another. The lowest in rank were the *caballeros*, originally men of noble birth; but during the religious wars the title of "caballero," or "knight," was given to certain men who offered themselves for service each equipped with arms and a horse. Most of the Spanish social classes were bound into a coöperative group on the basis of service in return for protection, the relationship being known as *encomienda*, or commendation. Thus the powerful nobles protected the weaker ones in return for military support; small landholders and free laborers likewise looked to the strong nobility as their guards and defenders, usually giving in return labor, produce from the land, or money payment. Bound to the soil were great numbers of serfs (a large fraction of them of Moslem ancestry); but as time passed, their general condition was much improved. Partly as a result of the liberties offered by the cities, practically the whole original slave class of Castile, which was made up of Christians, had been freed by the opening of the fifteenth century and their places taken by Mohammedan prisoners of war, later supplemented by captives from the Canary Islands and northern Africa.

The Jews and Moslems were important economic assets to the state, and therefore they were not harassed by serious efforts to convert them until the fourteenth century; but the authorities followed the policy of preventing them from merging with the nation. They were restricted to special sections of the cities, and in some cases small towns were set aside for the exclusive residence of the Moors, who there lived under their own laws. To guard further against the mingling of the Christian and non-Christian elements of the population, the latter were required to wear badges or distinctive styles of clothes. The Jews were largely confined to the cities, where they flourished as merchants and money-lenders and, in certain instances, as public tax-collectors. The Moslem part of the urban population also contributed to the commercial class. The ablest artisans were of Mohammedan descent, as were the best agriculturists, and under royal encouragement they did much toward developing fine breeds of sheep in the Peninsula, thus giving new importance to the grazing industry.

In the thirteenth century, under the influence of the clergy, religious intolerance began to show itself against the Moors and Jews in the form of galling restrictions which quickly developed into bitter persecutions. The Jews soon became the greater sufferers; for though their religion was usually made the pretext for action against them, the real reason was often envy and greed excited by their economic prosperity. In the time-honored manner, malicious propaganda was employed to fan the fires of hatred, and this repeatedly resulted in extensive massacres of the people of both religions. In 1391 a number of towns occupied by them were wiped out by fire and sword under the fanatical leadership of the clergy. During this crusade eleven thousand Jews were forcibly baptized in Valencia alone. Most of the survivors of these bloody attacks who did not become nominal adherents of the Roman Church went into exile.

SPAIN UNDER ISABELLA AND FERDINAND

In 1469 came an event opening a new era in Spanish history. The Infanta Isabel (or Isabella) of Castile and León married her cousin Fernando (better known as Ferdinand), heir to the throne of Aragon. Five years later Isabella became queen of the dual realm, and in 1479 Ferdinand succeeded his father as ruler of the neighbor state. Under the terms of the marriage treaty the laws and institutions of each kingdom were to be left intact and under the control of its hereditary sovereign, though Isabella, because of the greater size and importance of Castile, was given certain advantages. Ferdinand, one of the wiliest diplomats of his day, aspired to dominate Castile; but he met with little success while Isabella lived.

The new sovereigns promptly set about reorganizing and centralizing their dominions. Their method was, whenever possible, to permit old forms and names of local institutions to stand, while they themselves assumed the power connected with them. What happened to the hermandad of Castile is an example. This organization had in the past often fought against the turbulent nobility, enemies of royal power, and had rarely come into conflict with the sovereign; but Isabella decided to take no risks. Promptly after her accession she reorganized the brotherhood, retaining the old basis of municipal representation, but making her personal representative, the bishop of Cartagena, president of the governing council. Under the attractive name *Santa* (Holy) *Hermandad* the league did very effective work in clearing Castile of brigandage and in putting down rebellion. Later a similarly controlled hermandad was created in Aragon. The three great clerico-military orders that had developed in Castile during the reconquest—Calatrava, Alcántara, and Santiago—

were an even greater menace to royal ambition than the hermandades. Hence Isabella, with the consent of the Pope, calmly handed over to Ferdinand the masterships of all three. This move not only insured a far stronger national army but, through the revenues of the commanderies, also added much to the royal income.

The towns, which had been declining for more than a century, were more restricted in local authority by Isabella and Ferdinand. Formerly only certain ones were subject to the authority of the corregidores; now the local affairs of all were tampered with and dominated by them. As a further check upon the municipalities, and upon the corregidor as well, the crown sent out special investigators, one type of which was called *veedores* (later, *visitadores*). As further inducements to honesty and efficiency, local officials, especially the corregidores, were subjected to the *residencia*. This meant that they must reside at the seat of their official positions for a certain number of days after the expiration of their terms, so as to give opportunity for charges of maladministration to be brought against them and for trial of the charges.

By the time of Isabella's accession the Castilian towns had so declined as a national political force that only eighteen had representation in the Cortes, as against forty-nine in the preceding century. But this fact proved of little actual importance from a national standpoint, since Isabella and Ferdinand, like the Tudors of England, were adepts at securing needed revenue without consulting the national assembly. Under their grandson, Charles I (better known as the emperor Charles V), who came to the throne in 1516, the absolutist spirit, influenced by the theory of divine right, reached greater extremes. Hence, though the Cortes met more frequently, its power was even less than before. This was especially true of the Cortes of Castile, now limited entirely to a few deputies from towns, who were mere puppets of the king. Within the towns themselves the same spirit of subserviency became dominant.

As the Cortes declined, however, for a time the council grew in importance; and the *consejo real*, or royal council, was made by Ferdinand and Isabella and their successors the principal instrument of national and colonial government. Its duties were administrative, judicial, and (through advisory functions) legislative. Originally all the departments of government were under its control; but as the business of ruling became more heavy and complicated the sovereigns created special councils, such as those of the Inquisition and the Indies, to take over some of the work. But Philip II, the suspicious and indefatigable son of Charles I, who ruled from 1556 to 1598, would not trust even his councilors, and tried to pass upon all administrative matters personally. He has been likened to a spider sitting at the center of a great web and touching all the radiating threads; but he was an overworked and muddle-headed spider.

It was the desire of Isabella and Ferdinand that no one should be denied such justice as could be secured under the confused laws of the kingdoms—laws which they tried, but with little success, to harmonize and clarify. They reorganized and greatly improved the judicial systems of their realms; Castile stood in special need of this. The consejo real, which was the supreme court of the realm, was made more efficient. But most of the important cases went to the chancillerías, or audiencias, of which there were two in Castile in the latter part of the fifteenth century; for, besides the original one (which, after having moved from place to place, was finally established by Isabella in Valladolid, the capital), a new court had been set up in Ciudad Real, and later, in 1505, removed to Granada. The former had jurisdiction in major cases north of the Tagus River, and the latter to the south of it. As the need arose, these chancillerías were supplemented in the more remote parts by others of less prestige, known merely as audiencias. Below these was an elaborate system of lesser courts.

The most significant and far-reaching part of the two sovereigns' general policy was that dealing with religion. Isabella, greatly influenced by her Dominican confessor, Tomás Torquemada, was truly pious but also fanatically bigoted; Ferdinand was crafty and commercial; both saw the potentialities of the Church in connection with their plans for unified, centralized realms. The question of patronage had not at the time been settled between the Pope and the sovereigns of Spain, and the Pope had continued to insist upon his right to appoint to offices. In Castile, in particular, during recent weak reigns much papal influence had been exercised through filling various vacancies. Though loyal to the Pope from piety or policy, both the queen and the king resented this meddling from Rome and set about eliminating it. By tactful negotiation they secured virtual control of all Church appointments within their realms, and yet they so convinced Pope Alexander VI of their devoutness and loyalty that in 1494 he conferred upon them their most prized title, "the Catholic Kings." The clergy of Spain, especially of Castile, had long been scandalously immoral, ignorant, lazy, and inefficient,—a condition which for about a century had been cause for repeated complaint on the part of the Cortes. The control over them in her hands, Isabella, with the help of the devout and ascetic Cardinal Francisco Jiménes, proceeded to bring about a reform; and so successful was she that for a time the Spanish priests and monks were famed for their piety and industry.

In their early intolerance toward the Jews and the Mohammedans the Spanish clergy had been inspired from without by the action of Popes and Church councils. The medieval Inquisition had been established in Aragon during the thirteenth century by papal action, but it had never existed in Castile. Influenced by the fanatical Torquemada, the Catholic sovereigns were anxious to purge Spain of all heresy, but by means of an inquisition wholly local and Spanish. To the creation of such a tribunal, to be largely controlled by the Spanish sovereigns directly or indirectly, Pope Sixtus reluctantly gave his consent, and in 1480 it was set up in Castile. Three years later this court for trying heretics was placed under the "supreme and general council of the Inquisition," a specially created branch of the royal council. As time passed, numerous subordinate courts were created to take charge of ferreting out and punishing heresy throughout Castile and Aragon and the territories under their jurisdiction. Torquemada, inquisitor general from the establishment of the *Suprema* (as the general council of the Inquisition was called) until 1501, was the mainspring of the movement toward absolute religious unity; but the Catholic sovereigns were keenly interested in it from religious conviction, political policy, and (perhaps more incidentally), the desire for financial gain through fines and confiscations. Thousands of persons who failed to qualify theologically were burned to death as a result of Torquemada's intolerant industry, and many thousands more who escaped with their lives suffered loss of liberty and property; indeed, so fanatically zealous was the inquisitor general that more than once he was restrained by the Pope.

It was the dream of Torquemada to make Spain Christian and orthodox from the mountains to the sea; consequently he urged Ferdinand and Isabella to end Moorish control in Granada. To the king and queen this idea was by no means new or unwelcome. In their marriage treaty Ferdinand had pledged aid to Castile for this very purpose. Furthermore, the political weakness and demoralization which had marked that state for many years before Isabella's accession had caused the rulers of Granada to ignore their long-established financial obligations; and when the young queen demanded the customary annual tribute due to Castile, the king of Granada returned a contemptuous and defiant reply. Soon, however, the Moorish state was rent by internal quarrels, and Ferdinand and Isabella prepared vigorously for a final struggle against political Mohammedanism in Spain. Everything possible was done to give the last chapter of the reconquest the old character of a holy war —not a difficult task, because of the growing intolerance resulting from the Inquisition. The king and queen made a solemn pilgrimage to the shrine of Santiago, whose name again became the battle cry; a great silver cross, the gift of the Pope, was carried at the head of the armies, which were personally led by the sovereigns; and clergy, high and low, constantly labored to stimulate and maintain the crusading fervor of the rank and file. On January 2, 1492, after ten years of fighting, Granada fell under Christian control. Thus was ended the task undertaken nearly eight centuries before by a little group of

Visigothic refugees in the fastnesses of the northern mountains. The terms of surrender granted by Ferdinand and Isabella to the defeated Mohammedans were liberal and included the right to retain their religion and laws. For a few years all went well.

Meanwhile the Jews (particularly those who had long been merely nominal, or "false," Christians) were faring badly under the pressure of the Inquisition,—a situation which made those who had never pretended conversion to Christianity cling the more firmly to the faith of their fathers. In the interest of religious unity the only recourse left to the Catholic sovereigns was to drive the Jews from the Peninsula. Therefore, partly as a thank offering to God for his aid in the conquest of Granada, the sovereigns signed an edict in March, 1492, giving to all inhabitants of the Spanish realms who were professedly Jews four months in which to accept Christian baptism or leave the country. Some chose the first alternative; but most preferred exile, and many thousands, after suffering robbery and other outrages at the hands of their fanatical countrymen, departed, most of them finding refuge in Mohammedan lands.

Within a decade the Moors of Castile and León suffered the same fate as the Jews. In spite of her pledge of religious freedom to the people of Granada, Isabella became so zealous for their Christianization that in 1499 she practically gave this task to the iron-willed, fanatical Jiménes, who was now archbishop of Toledo. Jiménes adopted a policy of conversion by bribery and intimidation, which soon led to rebellion of the honest Moslems. As a result the queen issued an edict in February, 1502, giving all Mohammedans of Castile and León (which included Granada) two and a half months in which to accept Christianity or leave the country. The time allotted was intentionally too short for those in the interior to reach the ports of embarkation. Hence they were really faced with the choice between accepting death or the religion of the oppressor, and most of them chose the latter; but the majority of those able to depart from Spain in the time given did so, leaving behind them most of their worldly goods, which were confiscated by the royal officials.

These precedents for drastic intolerance were followed up by the successors of the Catholic kings. Under Charles, the emperor, and the first two Philips thousands of Mohammedans were put to death, either directly by the Inquisition or by the royal armies sent to suppress revolts against the oppression to which they were subjected. Finally, in 1609 and 1610 a clean sweep was made, and virtually all the people known to be of Moslem blood were exiled from the land.

Thus theological unity was achieved; and with it came perhaps as great political solidarity as Spain has possessed. But the price paid was disastrous. The very people driven out by blind bigotry were the most precious national assets. Not only were the Jews and Moors more industrious than the remainder of the population, but they were also more skilled and intelligent. Both had played a very large part in industry, commerce, and finance, and the Moors were the chief agriculturists of the land. Ultimately all economic activities were blighted by the elimination of these two religious groups.

During the reigns of Ferdinand and Isabella, as a whole, however, the material results were not greatly felt; in fact, although these sovereigns imposed certain unwise restrictions, such as sales taxes and price-fixing, their policy in general fostered economic development. Sheep-raising, which was favored to the hurt of agrarian activities, especially prospered; for through their *mesta*, an ancient and powerful corporation, the sheep-owners were able to force what terms they desired from the helpless tillers of the soil. Under the stimulation of new laws the Spain of the Catholic kings became famous for the manufacture of silk and woolen cloths of rare fineness, internal commerce took on new importance, and the merchant marine almost doubled within a few years.

Though Spain suffered economically because of religious bigotry and fanaticism, its intellectual crippling was even more serious. The races who were killed off or exiled because of their theological views included the best thinkers of Spain; and the Index and other devices set up by the Roman Church, with the approval of the sovereigns, discouraged the spirit of scholarly inquiry in the survivors. Hence, though Spain has contributed to the best modern work in painting and in imaginative literature, its gift to science has been meager indeed.

As was to be expected, the most general, or national, characteristics of the Spanish people were developed, directly or indirectly, in connection with their religious interests. From the great emphasis upon theology, shown in the crusades against the Moslems and in the activities of the local Inquisition, grew a bigotry and intolerance which in time included political thought as well as religion. The long centuries of fighting developed a militaristic psychology marked by excessive pride and sensitiveness and an inclination on the part of the Spaniards to hold life cheap and to use force to gain their ends. The contempt for the Jews and Moors (partly racial, but primarily religious) expanded into an exaggerated scorn for the activities in which these people were engaged—manual labor, agriculture, industry, and commerce—and led even self-respecting Spaniards to prefer begging to such work. But in the course of the centuries the proud Spaniards developed a form of social democracy that showed itself in a willingness to converse intimately with servants and other humble folk, even on formal occasions. This quality, Hume suggests, developed during the wars of reconquest, when all Christians, regardless of rank, felt very close to one another.

Nevertheless these characteristics did not exist to the same degree among all the inhabitants, and they were offset by various rather striking dissimilarities; for in spite of royal efforts at unification the separatism based upon the original political independence of the numerous geographic units continued and was stressed by racial diversity in the population. The Catalans, partly French in blood and for centuries under French influence, felt far closer in thought to their neighbors beyond the Pyrenees than did their fellow countrymen. The Basques continued to be uniquely sturdy, self-reliant, and liberty-loving. Isabella and Ferdinand and their successors for centuries followed the time-honored custom of swearing under the ancient oak tree at Guernica, in the "county and lordship of Biscay," to maintain the franchises (*fueros*) of the Basque people, their usages and liberties. The Galicians and Castilians, among whom were often seen the blue eyes and fair skins of the Suevi and Goths, were likewise people apart, conscious of the "otherness of others," although less individualistic than the Basques. But the northern groups had much more in common with one another than with those of the south, particularly with the Andalusians, among whom existed the strongest strain of Oriental blood. The southern Spaniards were less practical and dependable than their northern kindred, more care-free, imaginative, and emotional, and more filled with the joy of living, as expressed in gay, colorful dances and light-hearted poetry and song.

THE PORTUGUESE

> In the chronicles of the Middle Ages there are few episodes more dramatic than the change of fortune which transformed a half-civilized border fief of León into the foremost maritime power of Europe.
>
> JAYNE, *Vasco da Gama and his Successors*, p. 1

Because of its comparative size and its nearness to Spain, Portugal has been likened to a child tucked under a nurse's arm, the nurse being Spain. The simile is apt, spiritually as well as physically; for during many centuries Portugal's territory was dominated by Spanish rulers, and its existence as an independent nation is due to foreign political influences and not to physiographic ones. By means of outside aid the child escaped from its nurse's restraining arms.

Until near the close of the eleventh century Portugal's history was practically identical with that of the rest of the Iberian Peninsula. Its soil was occupied in varying degrees by Iberian, Celt, Phœnician, Greek, Carthaginian, Roman, Visigoth, Jew, Berber, and Arab, all of whom left some influence; but, as in the case of Spain, the cultural stamp of the Roman, Visigothic, and Mohammedan cultures was especially strong. When events of peculiar importance to it began to occur, the territory of Portucalia[1] was a fief of the little Christian kingdom of León and extended from the Minho River to the Mondego, an area about a third as large as the present Portugal. In the latter half of the eleventh century an unusually formidable Mohammedan invasion from Africa took place, causing Alfonso VI of Castile and León to appeal to Christendom for aid. Among those who responded was Count Henry of Burgundy, who in 1095 was rewarded for his services by receiving in marriage Alfonso's daughter Theresa, whose dowry was the counties of Oporto and Coimbra. With the title "Count of Portugal," Henry was made ruler over these territories as vassal of his father-in-law. This marriage arrangement formed the nucleus from which developed the extensive Portuguese empire. Henry and Theresa, both of whom were ambitious politically, laid the foundations; but their successors struggled for more than a century and a half against the Moors to the south and the Christian kingdoms to the east before Portugal became an independent state with its present European limits. This was substantially achieved by Affonso III (1248–1279), who not only proclaimed himself king of the land but also gained strong national backing by including in his Cortes delegates from the leading cities. In the struggle that followed with the Christian and Moslem enemies the Portuguese military orders and the royal armies proved loyal and efficient, to the disadvantage of the Moorish and Castilian forces. As a result, in 1263 Castile gave up to Portugal all claim to suzerainty over Algarve, the recently conquered last stronghold of the Moors on the Portuguese frontier. Thus the complete independence of Portugal was recognized, and its sovereignty over its present peninsular territory was firmly established.

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[1] The ancient name of Portugal—*Terra portucalensis*, or *Portucalia*—came from Portus Cale, a small harbor town which is now a suburb of Oporto.

Afterwards there was repeated friction with Castile, partly because the latter aimed to regain control of its small western neighbor. In the late fourteenth century, however, the tables were turned, and Fernão (Ferdinand) of Portugal laid claim, through kinship, to the vacant throne of Castile and León. A prolonged quarrel resulted. During the struggle came two events of major importance to the state: a strong alliance with England and a change of dynasty. It was the siege of Lisbon by the Castilians that caused Fernão to turn to England for aid.

He made appeal through John of Gaunt, son of Edward III—a shrewd move, for John claimed the throne of Castile in the name of his wife, a Castilian princess. The fact that France, England's historic enemy, was aiding Castile made an excellent reason for English support of the other side. Furthermore, England was anxious to secure commercial advantages in Portugal. Hence in 1373 the two formed a political alliance against all enemies. Twice afterwards, however, Fernão, who was one of the shiftiest and most unscrupulous of men, ignored England and made peace with Castile. He died in 1383, and not long afterwards Portugal's affairs began to improve.

This was because the last settlement that Fernão made with Castile proved intolerable to the Portuguese. Under it his only child, Beatrice, had married Juan I of Castile, and Leonora, Fernão's vicious queen, was made regent of Portugal until the eldest son of the marriage should be of age. The arrangement had aimed at the reunion of Portugal with Castile; but the treaty failed to reckon with the strong spirit of nationalism in Portugal, which caused deep resentment over Fernão's action. Leonora's tyranny aggravated the disaffection, and rebellion soon broke out against her, led by Dom João (John), grand master of the military knights of Aviz and illegitimate half-brother of Fernão.

João had the strong backing of the nation, but needed more aid. He appealed to England, which, despite the bad faith of Fernão, sent food, money, and men. But before help came the Castilians had again laid siege to Lisbon and been defeated and driven off through the heroic efforts of the Portuguese aided by a timely pestilence. In April of the next year (1385) a great Cortes meeting at Coimbra declared the throne of Portugal elective and unanimously chose as king the grand master of Aviz, who became João I of the new dynasty. He is commonly known in history as "King John the Great," a well-deserved title. Shortly after this election, word came that the Castilian invaders had been defeated in the north; and on August 14, 1385, took place at Aljubarrota the decisive battle for the preservation of Portuguese independence. On one side were the Castilians, aided by two thousand French knights; on the other were the Portuguese, reënforced by five hundred English archers sent by John of Gaunt. The outcome was an overwhelming victory for João of Portugal and his people. A few months later all question of Portugal's future independence was removed by the arrival of John of Gaunt himself with five thousand additional troops.

In May, 1386, was signed the treaty of Windsor, by which the existing treaty of alliance was confirmed, was amplified in its commercial features, and was made "perpetual." This agreement, which lasted for more than four centuries, had a marked effect upon Portugal's history. It was sealed by the marriage of Philippa, John of Gaunt's daughter, with King João of Portugal. Philippa's sister Catherine became the wife of Prince Henry of Asturias, heir to the Castilian throne. In connection with these marriage arrangements John of Gaunt gave up all claim to the throne of Castile on condition that that country and Portugal declare a truce. The terms were kept; and there followed for the little kingdom at the southwestern extremity of Europe two centuries of peace and prosperity, during which it expanded into a vast empire.

Portugal's geographic position was an important key to its imperial development; for unknown lands and seas beckoned just beyond the peninsular limits of the little state. João I himself began the great southward and eastward expansion of Portugal by capturing in 1415, with English aid, the Moorish stronghold of Ceuta on the coast of Africa. In this undertaking he was accompanied by his three sons, one of whom, Henry, commonly known as Prince Henry the Navigator, was for almost half a century the leading spirit in Portuguese maritime enterprises. The prince's interest in exploration seems to have been roused at Ceuta by rumors concerning the interior of Africa, and it ultimately led to discovery of the modern sea route to India by way of the Cape of Good Hope. Henry had decided curiosity about remote lands, and was anxious to connect these commercially with Portugal. Partly with missionary intent and partly with an eye to material gain, he hoped also to find a Christian prince reported to have a realm in the interior of Africa and secure his aid in fighting the Moors of that continent. In his work he had encouragement and finanical aid from his father, who in 1419 made him governor of the province of Algarve, the southernmost part of Portugal, and this became his base of operations. At Sagres, near Cape St. Vincent, he established a school in which the systematic study of applied science was revived through furnishing instruction in navigation and in the making of nautical maps and instruments. The men thus trained became the pilots and captains of the expeditions sent out by Prince Henry.

The Navigator's maritime labors began even before his removal to Algarve. Apparently as early as 1415 an expedition sent out by him discovered the Madeira Islands,—once known but forgotten,—and they were soon afterwards colonized. A little later the Azores also were rediscovered and explored. A more important goal was the African coast beyond Cape Bojador, which marked the southern limit of what was known to Christendom of the west coast. So great were the terrors believed to exist in the tropical seas and lands to the south of that point that even the bravest of Henry's captains found excuses for turning back short of the cape. Finally, however, through Henry's persistence, the great feat was achieved. In 1434 Gil Eannes, putting well out into the Atlantic, passed the dreaded landmark, after which he approached the coast to the south of it and found the sea "as easy to sail in as the waters at home." Moreover, he reported the land to be attractive. This voyage virtually laid the bugaboo of the tropics, born of medieval superstition, and thereafter progress southward was more rapid. An expedition of the following year passed the Moorish belt of Africa and reached the Negro lands beyond. In 1441 the first black captives were taken near Cape Blanco, and the modern African slave trade began. This traffic was encouraged by Portugal for three reasons: it provided financial support for the expeditions, it furnished an ample supply of forced labor for the untilled southern provinces of the country, and (in the opinion of the devout) it offered the bondmen a chance for eternal salvation through acquainting them with Christian doctrine. The interest in voyaging along the coast of Africa rapidly became more general, and within the next few years many hundreds of Negro captives were brought back. As time passed, gold dust, ivory, cotton, pepper, and other commodities were imported from Africa, but black men continued to be regarded as the most profitable import. All vessels trafficking south of Bojador were bound to pay the prince a fraction of the value of their cargo; and none might pass beyond the cape without his permission. Near the end of his career, however, Henry gave economic concessions to the knights of the Order of Christ, who had undertaken spiritual jurisdiction of Guinea and other non-Christian parts of Africa.

When the great Navigator died in 1460 the coast had been traced to a little beyond Cape Verde, and a momentum had been given to exploration which made the completion of the route to India merely a matter of time. In 1482 the Congo River was discovered; in 1488 Bartholomeu Diaz doubled the Cape of Good Hope and entered the Indian Ocean, proving the existence of a water highway to India. A mutiny of his sailors prevented him from reaching the goal; but it was attained ten years later by Vasco da Gama, who by way of the Cape reached Calicut in search of "Christians and spices." Soon Portuguese domination in the Orient began. In the year 1500 King Manoel I of Portugal assumed the optimistic and prophetic title "Lord of the conquest, navigation, and commerce of India, Ethiopia, Arabia, and Persia." The first Portuguese viceroy of India was appointed in 1505.

Previous to this, however, Portugal laid the basis for its colonial empire in the Western Hemisphere, with which this book is more seriously concerned. But before considering activities in that quarter, it would be well to look into the internal development of Portugal, in order to get some idea of its national characteristics and institutions at the opening of the colonial era.

As was to be expected, in many regards Portuguese domestic history paralleled that of Spain; but there were some marked contrasts. In their intelligence and energy the early rulers of the House of Aviz may be compared to Isabella and Ferdinand of Spain; but they had less power, because João I owed his kingship to election by the Cortes, which retained the advantage thus gained. The towns and cities of Portugal had also been able to keep more freedom than those of contemporary Spain; and for some time the nobility, who had been given lavish grants of land recovered from the Moors, clung to their ancient feudal privileges with an arrogant insistence. A change came in 1481, however, with the accession of João II, great-grandson of the first João. The new king abandoned the foolish African wars which his father had been waging and set about putting affairs in order at home, giving special attention to the turbulent nobles. The duke of Braganza, whose wealth exceeded that of the crown, was the most powerful and obstinate, and led the opposition to João's attempts at reform. Under the king's orders he was arrested, tried, and executed; and later about eighty other refractory nobles were put to death, a measure that ended feudal dominance in Portugal. It was now possible for João II to ignore the Cortes and establish despotic rule, which was becoming the fashion in western Europe.

The king used his power wisely, and gave strong support to learning and literature, as well as to shipbuilding and voyaging along the coast of Africa. But Manoel I, his successor, began to sow the seeds which produced a serious decline ending in temporary loss of Portuguese independence. Manoel made his first serious mistake through trying to unite the whole Iberian Peninsula under his rule or that of his house. With this ambition in view, he planned marriage with the Infanta Isabella, eldest daughter of Ferdinand and Isabella, whose only son had died; and in order to be recognized as heir to the crowns of Spain, he agreed to the terms laid down by the Catholic sovereigns—that he expel the Jews from his country and also the Moslems, many of whom had arrived from Spain after the fall of Granada.[1] In Portugal, as in Spain, these two elements formed the choicest parts of the population. Though segregated and heavily taxed, they had thus far not been seriously persecuted, and because of their intelligence, skill, and industry they were fairly prosperous. In an effort to retain the large income regularly coming from the Jews, and at the same time to comply with the terms of his marriage treaty, Manoel resorted to forcible baptism of Jewish young people by the thousands. The "new Christians" thus produced were forbidden to leave the realm, but all unbaptized Jews and Moors were ordered to depart before the close of October, 1497. Ten years later the emigration ban against the recently baptized Jews was removed, and within a few years the majority of them left the land of their birth. The intolerant policy of Portugal toward Jews and Moors had the same general effect upon the economic and intellectual development of the country as that of Spain, though to a lesser degree.

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[1] Manoel's political ambitions were never realized, for the only child by this marriage died in infancy.

On the whole, the early Aviz rulers maintained a strong policy toward the Roman Church. The clergy were not permitted to infringe seriously upon civil authority, and were required to maintain fairly high standards of morality and efficiency. But a change came in 1521 with the accession of João III, who was completely dominated by churchmen. The Inquisition, on Spanish lines, was introduced in 1536 and became very influential. João's successor, Sebastião (Sebastian), was an outright religious fanatic, quite under the influence of his Jesuit confessors. He neglected to marry, although this placed the throne and Portuguese independence in jeopardy. He was killed while engaged in a fantastic crusade against the African Moors and was succeeded by his childless great-uncle Henry, a younger son of Manoel I.

Even before the Portuguese kingship began to decline, the Cortes had weakened and had become practically nonexistent. João II's blow at the nobles naturally struck the assembly of the estates and deprived it of some of its earlier vigor. Yet it was called from time to time, and played a minor part in the government until the accession of João III, who, on account of the revenue from Oriental trade, was the richest sovereign in all Europe. Consequently there was no necessity to ask the Cortes for taxes, and for a considerable time the weakened estates were seldom assembled.

Social decline in Portugal kept pace with political and economic deterioration. This was due not only to the loss of the Jews and Moors, but to other factors as well. Many of the ablest and most energetic remaining inhabitants either went to the Orient to seek their fortunes or were killed off in the foreign wars. The decline of the population, in general, and the labor supply, in particular, was especially felt in the southern provinces, which were largely stripped of population. This resulted in the establishment there of a new industrial system. The rural lands were converted into extensive estates held by absentee landlords, and worked by large armies of black bondmen recently brought from Africa. Soon the population of Algarve was almost completely Negro; and by the middle of the sixteenth century, blacks outnumbered whites in Lisbon itself. As intermarriage between the two races went on from the beginning, within a few generations Ethiopian blood was generally diffused throughout the nation, but it was notably pronounced in the south and among the lower classes. In the north, traces of Gothic features persisted in the population, and some sign of Berber and Arab blood; but the Oriental strain was less marked in Portugal than in Spain.

These differences of racial composition rather than their few centuries of separate history explain such mental and moral characteristics as set off the Portuguese from the Spaniards. The former were less artistic, imaginative, and emotional than their Spanish neighbors, as well as less proud and sensitive, sharp-witted, and ingenious; on the other hand, probably owing to their Negro blood, they were more kindly and good-natured and more tolerant, stable, serious, and dependable. But their manners, customs, and habits, like those of the Spaniards, were survivals of their Roman, Gothic, and Arabic endowment.

Such, in brief, was Portugal in 1580 when King Henry, Sebastião's successor, died without direct heirs after but two years of rule. There were several eager claimants for the throne —among them Philip II of Spain, who was aided by his physical nearness to the goal and by the support of the Portuguese clergy. The nation was demoralized, and there was no Dom João of Aviz to lead in the defense; therefore in 1581, when Philip had defeated his most powerful rival, he was crowned king of Portugal. Thus began the "sixty years' captivity" of that country. During it Portugal, despite the victor's promises, was not permitted to remain a separate kingdom, with its own characteristics and institutions; for many changes of an institutional sort were introduced, especially in the Portuguese colonies.

IV

THE HISPANIC INVASION OF ABORIGINAL AMERICA

. . . più oltre navicar si puote
Però che l'acqua in ogni parte è piana,
Benchè la terra abbi forma di ruote; . . .
E puossi andar giù nell' altro emisperio,
Però che al centro ogni còsa reprime:
Sì che la terra per divin misterio
Sospesa sta fra le stelle sublime,
E laggiù son città, castella e imperio.[1]

Luigi Pulci, *Il Morgante Maggiore*, Venice, 1481

Pioneering Voyages

WHILE the successors of Prince Henry's captains were slowly working their way round Africa in search of a waterway to India, other European adventurers were trying to gain the same end by what was, in the minds of the masses, an even more daring method. According to fifteenth-century popular ideas the earth was flat. Yet bold navigators hoped to sail around it; for most European geographers held the view set forth more than two thousand years before by the Greek philosophers, that the earth was a sphere, and some had made maps and globes to illustrate this opinion. Intelligent merchant mariners agreed with the scientists, and a few of them made and launched bold plans for sailing out into the Atlantic. The earliest westward expedition of this period with which the Hispanic countries were

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[1] . . . one may sail further,
Because the water in every part is flat,
Although the earth has the form of wheels; . . .
And one may go down into the other hemisphere,
Because to the center everything is drawn:
So that the earth, by a divine mystery,
Remains suspended among the stars sublime;
And down there are cities, castles, and government.

Translated by Charles W. Lemmi

connected seems to have been undertaken in 1472 as a result of a request made by King Affonso V of Portugal to King Christian I of Denmark.[1] According to Danish and Portuguese records the expedition was fitted out in Norway and had western Iceland as its final point of departure. Didrik Pining, the piratical mariner who at the time was governor of Iceland, was the leader of the expedition, and his pilot also was a Northman; but two Portuguese noblemen, Alvaro Martins Homem and João Vaz Corte-Real,[2] accompanied it. The voyagers visited Greenland and coasts beyond (probably Newfoundland), which the Portuguese named Terra do Bacalhão, or "land of codfish."[3] Since the commercial relations between Iceland and Bristol were very close, it is probable that rumors of Pining's expedition reached the Venetian John Cabot after he had taken up residence in Bristol, and led him to promote expeditions to the west in search of land. A number of fruitless voyages had been made into the Atlantic under the auspices of Cabot and other Bristol merchants when, in 1493, the exciting word arrived that one Cristóbal Colón, a Genoese in the service of Spain, had reached India, the region of gold and spices, by sailing westward over the ocean.

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[1] It may be assumed that before Christian theologians began in the late Middle Ages to cripple scientific thought, numerous voyages to the west were made. There are legends of such undertakings by Phœnicians, Arabs, Portuguese, Welsh, and others. And it is now a well-established fact that in the late tenth century Scandinavians discovered Greenland, which is part of the Western Hemisphere, and established there colonies lasting for more than four hundred years; that they discovered the mainland of North America and tried unsuccessfully to colonize it; and that, until the latter part of the fifteenth century, relations were maintained between Norway and the western world. It was doubtless Affonso V's knowledge of these Scandinavian contacts that led him to turn to the king of Denmark and Norway.

[2] The father of Gaspar Corte-Real, who visited the Atlantic coast of North America about thirty years later.

[3] In his article "The Fortunate Isles," which was published in the *American-Scandinavian Review* for May, 1925, Alexander Bugge gives a brief popular account of the expedition. The following are more detailed and scholarly discussions: Sofus Larsen, "Danmark og Portugal i det 15de Aarhundrede" (*Aarböger for nordisk Oldkyndighed*, 1919); Ludvig Daae, "Didrik Pining" (*Historisk Tidskrift*, Anden Raekke, 3die Bind, Christiania, 1882); and Henry Harrisse, *Les Corte-Real et leurs voyages au Nouveau-Monde.*

In deciding upon his adventure Columbus was unquestionably much influenced by the geographic activities set in motion by Prince Henry the Navigator. He spent many years in Portugal, where he made maps for a living, married the daughter of one of Henry's captains, and apparently visited the Gold Coast of Africa with one of the Portuguese expeditions of his time. Reports of successful westward voyages may also have reached him and made an impression. According to his own statement he seems to have visited Iceland about 1477 and later to have been in Bristol. At either place he could easily have heard of transatlantic expeditions, including the Dano-Portuguese one of 1472. Columbus was also profoundly encouraged in his aims by the view that the earth was but five sixths the size of its actual circumference and that its surface was largely composed of land. This belief, gained chiefly from geographical works based upon Ptolemy and from a specific statement in the apocryphal book of Esdras, was strongly supported by reports of objects coming as drift from the west to the shores of the Azores and other Portuguese islands: unknown plants, strangely carved pieces of wood, and even the bodies of men with features unlike those seen in Europe. Columbus believed that these waifs of the sea, borne eastward by the Gulf Stream, came from the Orient, which he felt certain could be reached by a comparatively short voyage to the west. He determined to make such a voyage.

The story of his long discouraging struggle to secure financial aid and government backing for his proposed enterprise is too well known to need repetition here; it is sufficient to recall the fact that after the surrender of Granada, Isabella of Castile was ready to grant the request of the ambitious Genoese. In the capitulations drawn up in connection with the undertaking, Columbus was made admiral, viceroy, and governor-general "in all those islands and mainlands which by his hand and industry" should be discovered. He was also promised one tenth of all products which he might bring from the territory lying within his admiralty and was given permission to contribute at any time one eighth toward the equipment of westward-bound trading vessels and to retain a proportional share of the profits. In the documents no known land was named as the goal of the voyage, but the Catholic sovereigns gave the admiral a letter of introduction to the Great Khan of Cathay. After some delay the expedition set out from Palos, Spain, on August 3, 1492, in three small craft, the *Santa Maria*, a carack of one hundred tons' burden, being by far the largest. Its commander was Columbus himself. The other vessels were caravels: the *Pinta*, of fifty tons, and the *Niña*, of forty. Their commanders were the Pinzón brothers, wealthy Spanish navigators who had given Columbus material aid in connection with the equipment. Martín headed the *Pinta*, and Vicente was in charge of the tiny *Niña*. All told, the little fleet carried about a hundred persons, probably a number of them being criminals, freed from prisons to man the vessels. A delay of a month took place at the Canary Islands because of repairs needed on the *Pinta*; but on September 6 the voyagers again set forth, this time over unknown seas. Aided by the northern trade winds, they followed a course toward the southwest.

Apparently Columbus expected to reach land some seven hundred leagues westward of the Canaries, but in this he failed, though signs of land repeatedly appeared. Not until he had gone about two hundred leagues farther was his quest successful. On the evening of October 11, thirty-five days after the little fleet had left port in the Canaries, a flickering light was seen ahead; and on the following morning the grateful adventurers found themselves close to a low wooded island of the Bahama group, which the devout admiral named San Salvador (Holy Savior) and claimed for his sovereigns. Though the inhabitants were naked painted savages, Columbus believed that their land was one of the outlying parts of Japan, and soon left it in search of the larger parts of the archipelago. On October 28 he discovered the coast of a land called Cuba by its inhabitants, but he named it Juana, or Jane. After exploring it for some distance on the north, he concluded that it was some part of the Asiatic continent, and was so certain that he was close to Cathay that he sent two agents to search for the court of the Great Khan and to present to that potentate the compliments of Ferdinand and Isabella. Later, while sailing farther to the east, he discovered another large island, which he thought to be part of Japan. The portion of the north coast where he anchored was known by the inhabitants as Haiti, but Columbus called the island Española (little Spain) because of a fancied resemblance to the land from which he had sailed. The name was soon Latinized into Hispaniola. On the northwest coast of the island the *Santa Maria* was wrecked, and from its timbers Columbus had a fort built slightly to the east of the present Cap Haitien. In this stronghold, which he called La Navidad (the Nativity), from the fact that the vessel was destroyed on Christmas Day, he stationed about forty men, who agreed to remain until his return.

Early in January, 1493, he began the homeward voyage, in which stormy weather was encountered, making it necessary to put in first at the Azores and later at Lisbon. João II of Portugal received the admiral with marked honors, but was much disturbed over the successful undertaking made under the flag of his neighbors. As the result of explorations promoted by Prince Henry the Navigator, the Pope, who was still considered the arbiter of Christendom, had in 1456 given Portugal not only most of Africa but also all lands to the south of it, "as far as the Indians," or "the Indies"—an indefinite term including the little-known region extending from eastern Africa to China and Japan. Columbus called the aborigines whom he brought back with him "Indians." His reason, according to his son, was that the name suggested great wealth; but he apparently believed to the end of his days that the lands which he had discovered were at least outlying parts of the Oriental "Indies." João II naturally thought that the admiral, as agent of Spain, had been encroaching upon territory granted to Portugal by the Pope and placed within certain reach of that country by the recent voyage of Bartholomeu Diaz; and he indicated these views to Columbus; but he was well aware of the superior power of the Spanish sovereigns, and therefore permitted the voyager to depart in peace.

When Columbus reached Palos on March 15, 1493, he was received with general rejoicing, but soon made known to his sovereigns the unpleasing attitude of João II. They at once set about insuring the newly discovered lands against Portuguese pretensions. It happened that the Pope, Alexander VI, was a Spaniard and a good friend of Ferdinand, and to him they appealed. He responded by issuing a series of four bulls in the interest of the Spanish rulers. The most important of these, dated May 4, 1493, and confirmed and defined the following September, gave to them all lands, not occupied before Christmas, 1492, by any Christian prince, lying beyond a line to be drawn from pole to pole "one hundred leagues to the west and south from any of the islands commonly known as the Azores and Cape Verde." Though João II had a fair degree of respect for the Pope as head of the Church, he did not consider him infallible as an international lawyer and greatly resented the ambiguous but generous allotment made to Spain. He therefore opened direct negotiations with Ferdinand and Isabella, who were at the time rather desirous of Portuguese good will. The result was a supplanting of the papal arrangement by a treaty made in 1494 at Tordesillas. This treaty moved the line of demarcation three hundred and seventy leagues west of the Cape Verde Islands, Spain taking the territory to the west and Portugal that to the east. It also provided that within ten months a joint expedition should sail to mark the line where it should cut the land, and Columbus was selected to serve as boundary commissioner in behalf of Spain. But the line was never run, partly because of disputes arising over the indefinite language of the treaty; and repeated efforts of Spain and Portugal to agree upon a boundary between their possessions in the New World proved largely futile for nearly three centuries.

Before the treaty of Tordesillas was signed Columbus was off on his second voyage, sailing in September, 1493, with a considerable number of colonists aboard; for many were eager to seek their fortunes in the new lands, the wealth of which he painted in glowing colors. On the way out he discovered some of the Lesser Antilles and also a large island which he named San

Juan Bautista. It was later known as Porto Rico. He found that his La Navidad colony had been wiped out by the aborigines, probably in retaliation for ill treatment by the Spaniards; but to the eastward of its ruins he laid out a town, naming it Isabella, and placed his brother Bartholomew in charge. Again he voyaged westward of Hispaniola, visiting Cuba and discovering another island of considerable size. He called it Santiago, but the aboriginal name, Jamaica (land of springs), persisted.

After Columbus returned to Spain in 1496 his royal patrons showed declining interest in his discoveries. Unfavorable reports had preceded him to the court, and even his glowing and exaggerated accounts of the lands to the west could not prevent royal suspicion that something was wrong with his Indies, which at best gave meager evidence of the fabulous riches of Cathay. Queen Isabella was still kind; but popular enthusiasm had turned to criticism, and the admiral had such difficulty in securing colonists for Hispaniola that he found it necessary to eke out the number desired with ex-convicts and criminals freed from the prisons.

In May, 1498, however, he set out again, this time sailing farther to the south, and in consequence discovering several new islands, including Trinidad, Tobago, and Margarita, and also the mainland of South America, at the mouths of the Orinoco River. Late in August he reached Hispaniola, where an important change had been made since his last visit. Two years earlier his brother Bartholomew, under his instructions, had founded a new town on the south coast, at the mouth of the Ozama River. This settlement (later called Santo Domingo) flourished, for the site was more healthful than that chosen for colonization in the north; and Isabella was abandoned. The new town proved to be the first permanent settlement of European origin in the New World.

However, all was not well in Hispaniola when Columbus arrived, for he soon found not only that trouble with the Indians had increased, but also that insubordination and even serious rebellion had taken place among the Spaniards. Finding himself unequal to coping with the situation alone, he reported it to his sovereigns, requesting that an experienced lawyer be sent out to act as a judge. Already there had begun enslavement of the aborigines, who were made to work in gold mines discovered in Hispaniola; and in the vessel carrying his request for judicial aid Columbus sent a cargo of Indian bondmen, with the recommendation that Spanish cattle be supplied the colony in return for slaves. Isabella, in particular, was unfavorable to the project, and both she and Ferdinand, influenced by the admiral's own report of the unsatisfactory state of affairs as well as by many complaints against him which had reached Spain, concluded that he had no talent for governing. Hence, despite the terms made with him before the first voyage, in 1499 they sent out a commissioner with apparently large powers. This was Francisco Bobadilla, a veteran crown official, but a bad choice; for he treated the aborigines with extreme harshness, was partial to Columbus's enemies and hard upon his friends, and charged the admiral himself with injustice and dishonesty and sent him home in chains.

Columbus was a product of his day, and there was little connection between his unquestioned piety and the demands of high ethical standards. Moreover, he had shown no wisdom as an administrator. But certainly he did not deserve the treatment received from the commissioner, who had quite exceeded his instructions. As soon as the Spanish sovereigns learned of Bobadilla's actions, therefore, they restored the admiral to his former honors, except that they "temporarily" suspended his functions as viceroy, and conferred new distinctions upon him. Bobadilla was removed, and Nicolás de Ovando was appointed in his place; but Columbus's political authority was never restored.

Nevertheless his interest in exploration continued, and in 1502 he made a fourth voyage to the Indies. Being refused landing at Santo Domingo, he sailed westward and discovered the coast of Central America, exploring it from Honduras to Panama. Failing in an effort to colonize the region, he spent some time in Jamaica, but returned to Spain in 1504. He died at Valladolid two years later.

Columbus applied the general term "Indies" to the territory that he discovered, and this name was borne by the Spanish possessions in the New World during the whole colonial period. Though his own name has been given to many minor geographical entities in the hemisphere which he opened up to Europe, it was not applied originally to any of the lands discovered by him, primarily because his contemporaries, like himself, believed them to be parts of Asia. Instead, rather through accident, the New World was named for Amerigo Vespucci, an adventurous, aggressive Florentine merchant of worse than questionable veracity who claimed to have made four voyages to the western lands between 1497 and 1504. Probably, however, he made only three, and some of these appear to have been less extensive than his accounts indicated. He advertised his alleged achievements by means of letters, one of which, describing a voyage along the east coast of what is now Brazil, fell into the hands of Martin Waldseemüller, professor of cosmogeography in the University of St. Dié, in Lorraine. To Waldseemüller it seemed clear that the land described by Amerigo as a "fourth part of the world" was not Asiatic territory, but a region theretofore entirely unknown to Europe. Hence, in the introduction to a new edition of Ptolemy which he was preparing, he suggested that the land be named "America, because Americus discovered it." Apparently it was in this way that the idea was started, and in a few years maps of the recent discoveries showed what is now called Brazil marked "Amerike," or "America," though the rest of the southern continent was often termed "Novo Mundo"; but soon the name "America" included the whole land mass, which was at times represented as a great peninsula projecting from the southeast of Asia. Gradually, however, exploration revealed that the land to the north was not, as was at first believed, a part of the Orient, but another continent, hitherto likewise unknown to contemporary European geographers; and at first this was also called "New World" or "New Land," but gradually the name "America" was extended to include it.

SPANISH CONQUEST AND OCCUPATION OF THE ISLANDS

Without question the insularity of the part of the New World first reached and explored by Columbus contributed to the prompt establishment of Spanish control in the region. The aborigines, soon made hostile, could easily be crushed or eliminated in each island in turn; there was no extensive back country from which they could draw recruits. The terror and dismay inspired in the Indians at the first sight of horses gave the Spaniards a tremendous advantage at the outset, and this was easily maintained by their possession of firearms and steel armor. Hence in all the large islands and in some of the smaller ones Spanish control was established within twenty years after permanent settlement had been made in Hispaniola, which by 1513 had seventeen chartered towns. Ponce de León, who had been with Columbus when he discovered San Juan Bautista, was in 1508 given permission by Ovando to explore the island, and the next year he was made its governor. The first settlement proved to be in an unhealthy location and was soon abandoned; but San Juan de Porto Rico, established in 1511, prospered, and soon the name "Porto Rico" was applied to the whole island. About the same time Diego Columbus, who, as heir of his father, was now governor-general with his capital in Hispaniola, ordered that possession be taken of Jamaica; and settlement soon followed. Instructed by Ovando to explore further the land called Cuba, which Columbus had thought a continent, Sebastián de Ocampo in 1508 sailed round it, proving the admiral's error. Almost immediately conquest and occupation of the island began. By the end of 1515 seven settlements had been formed, including Havana, laid out in that year.

ESTABLISHMENT OF SPANISH CONTROL IN THE NORTHERN CONTINENT

The islands of the Greater Antilles were early made bases for exploring and colonizing expeditions to the neighboring continents, undertakings which tended to drain the islands of their

European element and material resources, thus interfering with their development. Columbus himself seems to have called serious attention to the southern mainland through his last two voyages, causing some enterprising Spaniards to make exploring and trading visits in that quarter. These were followed in 1508 by royal grants for colonies to Alonso de Ojeda and Diego de Nicuesa, the former to have a coastal region known as Urabá, extending as far west as the modern gulf of Darién (then known as Urabá), and the latter to have Veragua, a stretch of land joining Ojeda's and running westward to some indefinite point on the northern coast of Honduras. Late the next year the two men led out colonists to their territories; but the first settlements met with little success, and finally the survivors from both regions were gathered in the town of Santa María de la Antigua del Darién, in Veragua, but founded by Ojeda's colonists.

Before two years had passed both the leaders had got into trouble with the king and been eliminated from the feeble little colony, and another had emerged upon the quicksands of royal favor. This was Vasco Núñez de Balboa, a hidalgo who had failed as a planter in Hispaniola and gone to the Isthmus. Late in December, 1511, upon the downfall of Ojeda, Balboa was made provisional governor and military commander of what was then called the province of Darién. Since ambition and jealousy marked all Spaniards of prominence, all had enemies in plenty; and Balboa was no exception. By the early part of 1513 he was in serious disrepute at court. Apparently with the aim of regaining Ferdinand's good will by some brilliant feat, he decided to search for a great sea to the south and a land of gold beyond,—the Inca Empire,—of which an Indian chief had told him. On September 1, 1513, with a party of nearly two hundred Spaniards and about a thousand natives, he set out through the jungle of Panama. On the twenty-fifth of the month the expedition reached the crest of the isthmian Cordillera, and, standing "silent, upon a peak in Darién," Balboa gazed southward upon the greatest expanse of water on the globe. Four days later he and his followers reached what Richard Eden, in his translation of Peter Martyr's *Decades*, called "the bankes of the newe sea: where assemblynge al his men together with the Kynges scribes and notaries, they addicted all that maine sea with all the lands adiacent thereunto to the dominion and Empire of Castile." The discovery of the great ocean lying between America and Asia, which Balboa named Mar del Sur (South Sea), partly mollified King Ferdinand toward the discoverer, whom he now made "adelantado of the South Sea" and of two provinces on the Isthmus, with executive and judicial control. But the adelantado was to be subject to Pedrarias Dávila, who had been placed in charge of Darién and the old Urabá, which were united under the splendid name Castilla del Oro, or Golden Castile. Formerly Darién had been somewhat under Hispaniola; now, Pedrarias was responsible to Spain directly. For a time Balboa was very active in exploring the southern coast of the Isthmus and the adjacent islands. He also laid plans for the conquest of Peru, but owing to the jealous enmity of Pedrarias he was never able to execute them.

From the first there was intense interest in the South Sea, and many besides Balboa were desirous of exploring it. To secure a better base for such undertakings, Pedrarias in 1519 built a new capital, Panama, on the south coast, refounded the abandoned town of Nombre de Dios, which lay due north on the Atlantic side, and connected the two by a highway. For some time most of the voyages of discovery turned westward along the Isthmus. In the year that Panama was laid out an expedition reached the Gulf of Nicoya. Three years later Andrés Niño and Gil González Dávila, auditor of Hispaniola, undertook to advance far into the unknown in search of riches for themselves and their sovereign in the form of spices and precious metals. Having offended the jealous, tyrannical old Pedrarias, González failed of expected aid from him and was forced to build for himself the four vessels needed. After coasting as far as Chiriquí, about three hundred miles, he left the fleet to Niño and, with a few horses and a small force of men, advanced into the interior as far as the territory of the powerful cacique Nicaragua, in the region of the large lake later named for him. González's expedition proved a practically bloodless campaign of conquest. By making fierce threats in behalf of God and the "king of the Christians" (Charles V) he induced even the doughty Nicaragua to be baptized with about nine thousand of his subjects and to become a vassal of the crown of Castile. The land traversed was very rich; and the conqueror received many gifts of gold, some of it in the form of idols given up by the recently baptized. Meanwhile Niño had gone by vessel, exploiting the pearl fisheries and exploring as far as the Gulf of Fonseca. In 1523 the partners returned to Panama with a large fortune in gold and gems and a report of thirty-two thousand souls baptized into the Church! Gil González wished to return promptly to occupy and settle the rich lands he had traversed, but again he met with opposition from Pedrarias, who reaped where González had sown by sending out in 1524 a colonizing expedition which founded the towns of León and Granada in what is now the state of Nicaragua.

While González and Pedrarias were establishing Spanish rule and reaping personal gain in the Panama region and eastern Central America, other *conquistadores* (conquerors) were occupying and plundering the territory to the northwest. The deserted and decadent Mayan cities of Yucatán were discovered in 1517 by Francisco Hernández de Córdova while on a slave-hunting expedition. The next year Governor Velázquez of Cuba sent Juan de Grijalva on a voyage of trade and discovery beyond the point where Córdova left off. Grijalva coasted from Yucatán to the site of the present city of Vera Cruz, but the Cuban governor appears to have been dissatisfied with his achievement and decided to displace him.

The new expedition was put under the command of Hernando Cortés, a charming and adventurous nobleman from Estremadura who had been in the Indies since 1504, had aided in the conquest of Cuba, and was at the time alcalde of Santiago de Cuba. Cortés was instructed to establish trade relations with the Indians and Christianize them and to bring home treasure. When he was about to sail, Velázquez, who was of the characteristically jealous type of Spanish official, recalled his commission and ordered him arrested. Cortés, unusually shrewd and exceedingly ambitious, ignored the new orders, escaped from Santiago in November, 1518, and completed his equipment as best he could. He reached the coast of Mexico with eleven vessels, six or seven hundred men, eighteen horses, and a few cannon, and set about the conquest of Tabasco, on the Gulf of Campeche—an easy task. This accomplished, he advanced northward along the coast carrying with him as interpreters a Spaniard who had been stranded by a wreck and a Mayan woman baptized Mariana by one of the priests of the expedition.

Through these Cortés had heard of the wealthy realm of the Aztecs, and he coolly planned its conquest. In preparation he founded the town of Villa Rica de Vera Cruz ("rich city of the true cross") on the coast and, to give a semblance of authority to his enterprise, had the municipal council which he appointed name him captain general and chief justice of the colony. Then, to cut off all effective means of retreat, he scuttled the ships that had brought the expedition to Mexico and prepared to march into the interior, where, it happened, the situation was very favorable to his daring project.

Because of an ancient tradition of mysterious origin, the Aztec leaders believed that their ancestors had once had an overlord who, repudiated by them, had departed eastward over the seas, but that his descendants or representatives would some day come to recover the realm and claim homage of their hereditary vassals. Moctezuma II, Aztec emperor as well as high priest at the time of Cortés's invasion, had developed a fearful conviction that the reconquest would come in his reign, for signs and omens betokened it. From his spies and agents he early received reports of the landing of Cortés, accompanied by vivid drawings of great ships and of fair, bearded men mounted upon strange beasts. He appears to have believed at once not only that the newcomers were divine, but that they or their sovereign were the legitimate rulers of the land over which he and his predecessors had long held sway. But he was unwilling to relinquish his throne. Fearing the invaders, with whom he felt quite unequal to cope, he refused a request of Cortés for an interview and tried to bribe him to depart.

Unfortunately for Moctezuma, his seventeen years of rule had been so oppressive as to cause restiveness and revolt among his tributaries. This fact Cortés quickly learned, and found it fairly easy to secure the alliance of a number of the disaffected caciques, especially since they readily believed that he and his men were demigods and that his sovereign, Charles V, was, as he told them, ruler of the "universal world." Those who resisted he won by the sword. He induced all his allies to accept Christianity or forced the new religion upon them, his battle cry being the old crusading "Santiago! Santiago!" Early in November, 1519, he arrived in the Valley of Mexico with an army of about three hundred and fifty Spaniards and some thousands of Indian allies. As the invaders approached the margin of Lake Tezcoco they saw framed in the sheet of water before them Tenochtitlán, the Aztec capital, with its extensive palaces, towering temples, and brilliant tropical gardens. When Moctezuma had found it impossible to induce the Spaniards to leave the land, he had sent them an invitation to visit him. Now, with a group of chieftains, he came out upon the causeway leading to the city from the north, to extend a semblance of welcome. According to one Spanish chronicler, Cortés, in greeting, took off a string of agate beads and placed it about the neck of Moctezuma, who, after the party had arrived in the city, reciprocated with a collar of gold crabs.

At a formal conference which soon took place in the imperial palace the Aztec ruler declared his conviction that Cortés represented the rightful lord of the Aztecs, and diplomatically expressed his regret that the ancient power had not been earlier restored. According to a Tezcocan account he added:

> I now see that it was true what the departed lords left word with us: that you would return to reign in these realms and would seat yourself on your throne and in your chair. Be welcome! Rest now after the labor you have had in coming such long ways. This is your house and these are your palaces—take them and rest therein with your captains and the companions who have come with you.[1]

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[1] Zelia Nuttall, "Some Unsolved Problems in Mexican Archæology," *American Anthropologist* (New Series), Vol. VIII, No. 1, pp. 139–140.

This was an extraordinary speech, and the scene was one of the most dramatic in history; and yet Moctezuma had no intention of giving up his authority if he could escape doing so. However, he provided his unwelcome guests with suitable quarters in one of the palaces, and discussion proceeded, especially on the subject of Christianity, which the royal high priest showed unwillingness to accept. Visits to the temples with their human sacrifices made Cortés more determined to supplant the religion of the Aztecs with his own; hence, after Moctezuma had given a decisive refusal in favor of the gods of his fathers he was made prisoner in the Spanish quarters. During the next few months the invaders were very active in exploring the outlying parts of the Aztec realm and securing the support of its local rulers. Meanwhile their royal captive became more and more broken in spirit. Finally, "with as many sighs and tears as a man could possibly bring forth," he instructed his vassals to transfer their allegiance to the Spanish king and pay their tribute to him, as he himself must do in future. Moctezuma and his caciques then all swore fealty to Charles V. Somewhat later Cortés forced the emperor to hand over to him one of the temples for Christian worship, a desecration that greatly stirred the priesthood and roused the population against the Spaniards, who by this time were no longer feared as gods.

While difficulties were threatening in the capital, Cortés received word in May, 1520, that an army under Panfilo de Narváez had been sent against him by Governor Velázquez of Cuba, who, since Cortés's departure, had obtained from Spain permission to conquer and settle Mexico. Leaving a small force under Pedro de Alvarado, in charge in Tenochtitlán, Cortés sped to the coast, where he met and defeated Narváez and made him prisoner. Meanwhile rebellion had broken out in Tenochtitlán against both Alvarado and Moctezuma. On receiving tidings of this, Cortés returned as soon as possible to the Aztec capital with as large an army as he could gather. His arrival acted as a signal for a general uprising, and for some days terrific fighting took place in the city, during which time Moctezuma met his death by some unknown cause. It was the object of the Aztecs to exterminate the Spaniards; and to prevent their escape they cut the drawbridges over the causeways. Under Cortés's instructions portable bridges were built to close the gaps in the shortest of the causeways, over which the unhappy Spaniards one night tried secretly to escape. Their attempt was almost immediately discovered, and a horrible slaughter followed. Cortés gained the mainland, but left behind him the corpses of more than half his men. This night (June 30, 1520) is referred to in Mexican history as *la Noche Triste* (the sorrowful night).

After several days of perilous retreat the remnant of the Spanish army reached safety, and Cortés straightway began preparations to recover the lost realm. From Spanish sources he gained some aid, including much-needed gunpowder, and he assembled a large army of aborigines; but the most important part of his preparations was the building of thirteen brigantines to use on Lake Tezcoco. On May 26, 1521, siege of Tenochtitlán was begun by cutting the aqueduct that brought the city's water supply from springs beyond the lake. After much bloody fighting the Spaniards were masters of the Aztec capital, with the existing emperor, a youth named Cuauhtemoc, a prisoner at their mercy; but in the end some of the victors felt that they had labored in vain, for a careful search of the city failed to reveal the great fortune in precious metals which they had expected. Cuauhtemoc, on being put to torture, stated that much gold had been thrown into the lake; but diving brought up very little, and to this day the supposed hidden treasure of the Aztecs apparently has never been discovered.

Establishing his headquarters close by, Cortés set about rebuilding Tenochtitlán. On the site of the great temple of the Aztec god of war he erected a cathedral dedicated to St. Francis. Under the name "Mexico" the city became the seat of the viceroyalty of New Spain when the northern portions of the Spanish dominions were organized under that name. Meanwhile Cortés gained from Charles V that for which he had hoped —approval of his daring acts and a commission making him governor, captain-general, and chief justice of the conquered territory. He continued to increase this territory in area by sending out new expeditions against neighboring regions. Ancient cities were overthrown and new ones built. Within a few years most of the important tribes of the Mexican plateau had sworn allegiance to the crown of Castile.

Cortés was specially interested in the lands toward the south; for he was jealous of the activities centered in Panama, and he also hoped to find in that direction a strait leading to the Spice Islands. Toward the south, therefore, he sent Pedro de Alvarado, who in 1524 founded a city that came to be called Guatemala. The next year Cortés himself led a land expedition down the Isthmus as far as the present state of Honduras, where another of his agents had begun to lay out the city of Trujillo. In 1527 Francisco de Montejo, commissioned as adelantado by Charles V, began the conquest of Yucatán; but the Mayas fought fiercely, and it was not until 1542 that their power was broken and Mérida, the present capital, was built on the ruins of the ancient city of Tihoo.

Meanwhile other Spaniards, urged on by various motives, were at work farther north tracing the coast line along both oceans and penetrating into the interior. One of the earliest of these was Ponce de León, governor of Porto Rico, who in 1513 set out with a royal patent for the discovery and colonization of a reported island to the west called Bimini by the Indians. He reached and explored a long coast line clothed with subtropical vegetation, and believed it to be the territory sought. To this region, which was really a peninsula, he gave the name "Florida," and later tried, but in vain, to form settlements within it. In 1519 the newly discovered land was used as a point of departure by Alonzo de Pineda, who was sent out by the governor of Jamaica and coasted westward perhaps as far as Vera Cruz. Thus by 1520 the main outlines of the Caribbean Sea and the Gulf of Mexico were known. In 1521 important exploration began northward along the Atlantic coast of the continent. An expedition sent out by Lucas Vásquez de Ayllón to trace the mainland to the north of the Bahamas got as far as some part of the coast of the present state of South Carolina. In 1526 Ayllón himself, who had secured a grant to colonize eight hundred leagues of the shore to the northward, set out with several hundred men and made an unsuccessful attempt to settle an unhealthful tract of ground which was probably somewhere on Chesapeake Bay. This region had been reached from the north a year or two before by Esteban Gómez, a Portuguese, who, sailing under the flag of Spain in search of a northwestern strait, had followed the coast from a point probably in the neighborhood of Nova Scotia.

A little later a similar work was done on the Pacific coast by ambitious Spaniards, most of them coming from Mexico. One of the most energetic of these, Cortés himself, having failed to find a strait at the south, built a shipyard on the Pacific in the interest of fostering exploration farther north; it was at Zacatula, southwest of Mexico City. By 1533 the coast had been followed from Panama to somewhat north of Zacatula. In that year an expedition sent out by Cortés discovered Lower California, which for a time was thought to be an island; but the interest in the region, due to the discovery of pearl oysters, soon led to the discovery of its peninsular character. The first European to reach the head of the Gulf of California appears to have been Francisco de Ulloa, who accomplished this in 1539 and later sailed for some distance along the west coast of the peninsula. In 1542 Juan Rodríguez Cabrillo (sent out to look for the elusive strait by Mendoza, the viceroy of New Spain) began where Ulloa had left off, discovered San Diego Bay, and explored the coast to a little above San Francisco Bay, which he failed to find. Returning, he died of injuries in Santa Barbara Channel; but his pilot, Bartolomé Ferrelo, sailed northward again, probably making the Oregon coast, the farthest point on the northern Pacific reached by the Spaniards during the century. It was not until two hundred years after Ferrelo's voyage that the strait to the north was found; and the discoverer was not a Spaniard, but a Dane, Vitus Bering, in the employ of the government of Russia.

Even before Cabrillo entered San Diego Bay the Mississippi

Valley had been penetrated and traversed for thousands of miles by two virtually coincident expeditions—the one led by Francisco de Coronado and the other by Hernando de Soto.

The first was stimulated to some extent by reports furnished by survivors of an ill-fated expedition that started overland from Tampa Bay, Florida, in 1528, under the command of Narváez, who some years before had been sent by the governor of Cuba against Cortés. All the party except four finally died in Texas. After years of wandering the survivors, one of whom was Alvar Núñez Cabeza de Vaca, treasurer of the expedition, finally reached Mexico.

The reports of the strange things they had seen fell upon minds already roused by the tale of an old Indian, who said that when he was a child he had visited seven rich cities in a northern region, called Cíbola. A reconnoitering party which Mendoza sent out seemed to establish the existence of these cities, and the viceroy promptly planned to conquer them. The expedition which he prepared at royal expense was a large one, including nearly three hundred Spaniards and eight hundred Indians, many pack mules and hundreds of horses, and large droves of cattle, sheep, goats, and pigs, for food. The leader of the undertaking was Mendoza's friend Francisco de Coronado, at the time governor of New Galicia, a border province of the viceroyalty. Two vessels commanded by Hernando de Alarcón were instructed to aid the expedition by carrying some supplies to the head of the Gulf of California. In 1540 both land and water forces set out from Culiacán, the base on the gulf, Alarcón proceeding up the Colorado River for about two hundred and fifty miles.

The land party under Coronado went almost due north from the gulf, crossed in a somewhat northeasterly direction what is now the state of Arizona, and found and conquered Cíbola, a group of humble Indian pueblos guiltless of golden treasure. Disappointed in his quest so far but not discouraged, Coronado advanced farther into the northeast, now seeking a town called Quivira, alluringly described by another Indian. Leaving the main body of his party behind (perhaps near the western borders of the present Oklahoma), he went on with a small force to the interior of the present state of Kansas, where he found Quivira, a village of poverty-stricken seminomadic Indians. Convinced that the part of the continent he had been exploring contained no settlements worth exploiting for their wealth, Coronado led his expedition back to Mexico. His efforts had not been in vain, however, for they contributed much knowledge of the unknown region to the north, its limitations and its possibilities.

While Coronado was exploring what is now the southwestern part of the United States, Hernando de Soto was unconsciously coöperating with him in the southeastern section. De Soto, as an agent of Pedrarias, had helped in the conquest of Central America, and more recently he had played an important part in the overthrow of Inca rule in Peru, after which he had returned to Spain with a considerable fortune. Desiring further lucrative adventures, he secured from Charles V a commission to conquer and settle the indefinite region then known as Florida. After extensive preparations in Cuba, he set out, landing in Tampa Bay in May, 1539, with an army of more than six hundred well-armed men and a large number of horses. For three years he wandered, fighting hostile Indians and vainly seeking golden treasure, up to the Piedmont of the present state of North Carolina, southwest to Mobile Bay, then northwest toward the site of Memphis, where in May, 1541, he discovered the Mississippi River, crossed it, and traversed the plains of Arkansas and Oklahoma until he reached the Arkansas River, which he then followed to its outlet in the Mississippi. That he was very near the Coronado expedition at one time was evident from the fact that an Indian woman who had escaped from Coronado's party fell into the hands of de Soto's soldiers nine days later. After reaching the Mississippi for the second time, de Soto decided to descend it to the coast and establish communication with Cuba; but he died of fever in May, 1542, soon after the voyage began, and was buried beneath the waters of the great river. His companions, much reduced in numbers, followed the coast and finally reached Panuco, near what is now Tampico, Mexico.

Many years passed before permanent settlements were made in the regions explored by Coronado and de Soto, a delay caused chiefly by lack of interest in them. No precious metals were found there, and no vegetable products of special value to Spain, which, like other European countries at later times, was anxious to secure tropical lands yielding spices and other commodities not native to her own soil. Hence lands lying within the temperate zones were on the whole neglected. Saint Augustine, Florida, founded in 1565 by Pedro Menéndez to keep out French Protestants, proved to be the first permanent settlement within the vast area. Another generation passed before an attempt was made to colonize the region which had been traversed by Coronado. Then, in 1598, Juan de Oñate led a royal expedition north from Mexico, and on the upper waters of the Rio Grande laid out the town of San Juan. Franciscan missionaries who accompanied the party were apportioned among the Indian villages in the surrounding region and began doctrinal work. But San Juan failed to prosper, and in 1609 a new headquarters was laid out, Santa Fé, in the present New Mexico. This proved to be the first permanent European settlement in the southwest above the Rio Grande.

ESTABLISHMENT OF SPANISH CONTROL IN THE SOUTHERN CONTINENT

While men bearing the banner of Spain were thus showing an amazing activity in the islands and northern mainland of the New World, others of equal energy and courage were devoting themselves to the exploration, conquest, and colonization of the southern continent, which Columbus had discovered on his third voyage. This land fired the imagination of Alonzo de Ojeda (later connected with Darién), and he decided to learn more about the region. Accompanied by Amerigo Vespucci and Juan de la Cosa, the famous pilot and cartographer, he set forth in 1499 with a little fleet of four vessels, reached the coast, probably in the neighborhood of the present city of Paramaribo, and followed it westward as far as Lake Maracaibo. To the lake region he gave the name Venezuela (little Venice), from the fact that the natives built their huts on piles over the water.

Late in the same year Vicente Pinzón, commander of the *Niña* on Columbus's first voyage, sailed from Palos on an independent expedition. He struck boldly to the south of west, was carried farther southward by a violent storm, and on February 7, 1500, sighted the extreme eastern part of South America. After sailing southward for a short distance he turned about and coasted to the northwest for about two thousand miles, discovering the mouth of the Amazon, which he took for the Ganges.

Two months after Pinzón first saw Brazil a Portuguese fleet bound for the East Indies under command of Pedro Alvares Cabral sailed farther westward than was customary for voyages round Africa and sighted the coast several hundred miles south of the point reached by Pinzón. Cabral claimed the land (which he believed to be an island) for King Manoel of Portugal, named it Santa Cruz, sent a vessel back to report the discovery, and proceeded on his voyage to the Orient. Thus Portugal's claims under the treaty of Tordesillas were reënforced by actual discovery of land and by formal declaration of ownership.

In 1508–1509 Vicente Pinzón, accompanied by Juan Díaz de Solís, again sailed along the east coast of South America, perhaps going as far as the present republic of Uruguay. The expedition had a commission from Spain to seek the Spice Islands, and was in search of a strait through which to pass. In 1514 Solís, now chief pilot of Spain, was instructed by King Ferdinand, who had been stimulated by discovery of the South Sea, to explore the southern continent for seventeen hundred leagues or more beyond the Isthmus of Panama, but to avoid trespassing upon Portuguese territory. Solís encountered the Brazilian coast near the site of Rio de Janeiro and continued south until he reached the estuary of the river now called the Plata and named it for himself. On its banks early in 1516 he and a number of his men were killed by Indians; the survivors of the expedition gave up and returned to Spain.

These feats were, however, destined to shrink into comparative insignificance as a result of the achievement of Fernão de

Magalhães, or Ferdinand Magellan, a Portuguese of noble descent, who, as a contemporary put it, was "of courage and valiant in his thoughts and for undertaking great things." Several years of experience in the East Indies, and the reports of a friend who had penetrated farther into the Orient than he himself, had inspired Magellan to try to accomplish what Columbus and others had attempted in vain—to find the Spice Islands by sailing west. He went to Spain in 1517 after seemingly being refused aid in the enterprise by King Manoel of Portugal, became naturalized, and soon had an opportunity to present his theories and plans before Charles V. It was Magellan's opinion, based upon his first-hand knowledge of the Orient, that the islands sought were on Spain's side of the demarcation line of 1494 where it cut through the Orient. In an effort to reach them he aimed to look for a strait leading into the South Sea in the region beyond Solís's river. Charles was favorably impressed with the plan and promised aid; but he stipulated that Magellan should sail the five vessels with which he was provided only within Spanish jurisdiction as laid down by the treaty of Tordesillas. It was no easy task to secure crews for the ships; but finally about two hundred and seventy men were collected. Nearly twenty different racial or national groups were represented, an appropriately cosmopolitan lot for the great adventure.

On September 10, 1519, the little fleet sailed from the port of San Lucar de Barrameda, in Spain, and struck out for the southwest. The estuary of the Plata River was reached early in January; and after exploring this to assure himself that it was not the desired strait, Magellan proceeded south, carefully examining every indentation of the coast for a possible outlet. The continental wall still stretched ahead on the right hand for unknown leagues when March arrived, and therefore Magellan decided to spend the winter in a harbor, now known as Port St. Julian, at forty-nine degrees south. His men, content with having reached a farther point than any other expedition, wanted to turn back to Spain; but this the commander refused to consider, and tried to reconcile them to his plan by appeals to their courage and ambition. However, the officers of three of the vessels mutinied, many of the men sided with them, and they were overcome only by quick and drastic action on Magellan's part.

As soon as spring had advanced sufficiently, the voyage southward was resumed; and on October 21, 1520, the adventurers had their first view of the long-sought passageway to the South Sea. It took the fleet thirty-eight days to thread the narrow, winding strait, which later came to be called after Magellan. Only three of the five original vessels made the passage; for one had been wrecked on the Atlantic coast some months before, and another, the *San Antonio*, was seized in the strait by mutineers led by the pilot Esteban Gómez, who a little later, while seeking a northwest passageway, sailed along the east coast of North America and then returned to Spain (see page 120).

Though terrors and discouragements of various sorts beset him, Magellan seems never seriously to have considered giving up his plan to reach the Spice Islands by sailing west. Late in November some men who had been sent ahead in a boat returned with the report that they had discovered the cape at the west end of the strait and the open sea beyond. Antonio Pigafetta, the member of the expedition giving the best account of it, wrote that when this news was received "the captain-general wept for joy, and called that cape, Cape Dezeado, for we had been desiring it for a long time."[1]

The great ocean, which Vasco Núñez de Balboa had discovered seven years before and named the South Sea, impressed Magellan so favorably after the storm-tossed Atlantic that he called it the Pacific, a name which in time supplanted the earlier one. After following the west coast of South America northward to about the fiftieth parallel of latitude, the little fleet, in the middle of December, 1520, struck boldly northwest over the seemingly limitless stretch of ocean. For nearly four months the intrepid mariners sailed on, seeing no land except two desert islets. Food was so scarce that it was necessary to eat rats and oxhides, and "biscuit that was no longer biscuit, but powder

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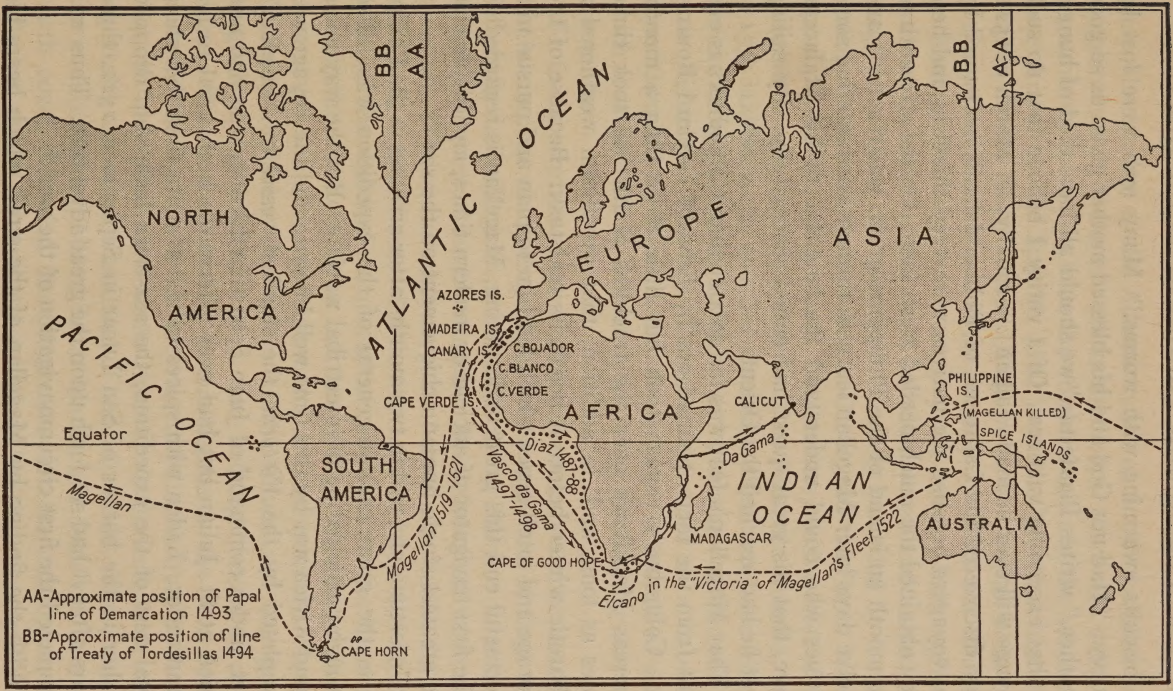
[1] Antonio Pigafetta, *Magellan's Voyage around the World*, Vol. I, pp. 69–71. Edited by J. A. Robertson.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AUSTRALIA
AZORES IS.
MADEIRA IS.
CANARY IS.
C.BOJADOR
C.BLANCO
C.VERDE
CAPE VERDE IS.
Equator
CALICUT
PHILIPPINE
IS.
(MAGELLAN KILLED)
SPICE ISLANDS
Da Gama
Diaz 1487-88
Vasco da Gama
1497-1498
Magellan 1519-1521
Magellan
MADAGASCAR
CAPE OF GOOD HOPE
Elcano in the "Victoria" of Magellan's Fleet 1522
CAPE HORN
AA-Approximate position of Papal line of Demarcation 1493
BB-Approximate position of line of Treaty of Tordesillas 1494

VOYAGES OF DIAZ, DA GAMA, AND MAGELLAN

of biscuits swarming with worms." Many men were lost by scurvy. "Had not God and his blessed mother given us so good weather," writes Pigafetta, "we should all have died of hunger in that exceeding vast sea. Of a verity I believe that no such voyage will ever be made [again]." Finally, on March 6, 1521, they discovered the Ladrones, or Robber Islands, so named by the voyagers because the natives were very thievish, and here they obtained the much-needed fresh food. On the sixteenth of the month an island of the Philippine group was reached; and twelve days later Magellan learned, through encountering some natives who could understand the language of his Malaccan slave, that his great quest had ended successfully. By sailing west he had reached the Orient.

That Magellan's feat was far greater than Columbus's is evident from the facts, pointed out by Edward Gaylord Bourne, that Columbus's voyage took but little more than a month, whereas Magellan's over the trackless South Sea took three times as long, and, in addition, that expedition weathered a subarctic winter before it began its real task. Because of the courage and intelligence which led him to plan and pursue to a successful end this great undertaking, Magellan is regarded as "the first navigator of ancient or modern times, and his voyage the greatest single human achievement on the sea."[1]

Unfortunately, within two months after arriving in the Philippines the great captain-general of the expedition was killed through participating in intertribal warfare. But the way home round Africa was by this time well known; and the voyage was completed by the *Victoria*, the smallest vessel of Magellan's fleet, under command of Juan Sebastián Elcano, who had mutinied at St. Julian but had ever afterwards been loyal to his commander. Laden with spices valued at more than the whole royal cost of the expedition, the sea-worn little ship dropped anchor in the harbor of San Lucar in September, 1522, three years after it had set forth upon the great adventure. Thus was completed the first circumnavigation of the world.

With the finding by Magellan of the strait which bears his name, the tracing of the Atlantic coast of South America was completed; but, owing to various handicaps, there was delay in permanently occupying even the northern coast of the continent (later known as the Spanish Main) which Columbus had discovered twenty years before. This work was begun, however, in 1525, when Santa Marta in the present Colombia was founded by Rodrigo Bastidas, who, many years before, had explored much of the neighboring coast and discovered and named the Magdalena River. But Bastidas, mortally wounded by a companion, died shortly afterwards in Cuba, and the Santa Marta region passed into other hands. The territory to the west of the Magdalena was granted by Charles V to Pedro de Heredia, who in 1533 laid out a city on a beautiful bay which reminded him of the harbor of Cartagena in Spain, and to his new settlement he gave this name. The new Cartagena was used as a base for expeditions led by Heredia into the interior in search of gold, which was secured in fair abundance by plundering the native tombs.

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[1] Edward Gaylord Bourne, *Spain in America*, p. 128.

From the south soon came other adventurers and seekers for dominions over which they might hold sway. One of these was Sebastián de Belalcázar, a subordinate of Pizarro, then busy with the conquest of the Inca empire. Belalcázar had been made governor of Quito, the northern part of the realm, but he did not want to be a subordinate. Furthermore, he had heard of El Dorado and the wealth of the aboriginal peoples to the north, and he coveted this. In 1535 he set out through the wild, mountainous country beyond Quito and spent two or three years in western Colombia exploring the valleys of the Cauca and the upper Magdalena, fighting the natives and helping himself to their riches. Then he turned to the eastern highlands, the heart of the Chibcha district; but to his surprise and discomfiture he found that another Spaniard, Gonzalo Jiménez de Quesada, also seeking wealth and fame, was ahead of him. Quesada, chief judge of the weakly, sickly town of Santa Marta, had come up from the north coast, following the Magdalena for the most part and suffering almost incredible hardships. To the country of the Chibchas he gave the name "New Granada," and in 1538, after a bloody conflict with the natives, he laid out the city of Santa Fé de Bogotá. Fortunately for himself, Belalcázar promptly informed Quesada that he would be satisfied with the territory of the Popayáns in the west, in which King Charles later confirmed him; but Quesada was deprived of all right to the land of the Chibchas in favor of Luis Alonzo de Lugo, son of the governor of Santa Marta who had sent out the expedition but who had since died. Into other parts of the territory of the present Colombia came other adventurers seeking El Dorado, and much of the history of the next decade or so was made up of quarrels between them.

During the first two decades of the sixteenth century the region named Venezuela by Ojeda was frequently visited by seekers of the fine pearl oysters then abundant along the coast, or by slave-hunters who carried off the helpless aborigines, or by Dominican friars who sought to protect the natives and to save their souls. But no permanent settlement was made upon the coast until about 1520, when Nuevo Toledo, later known as Cumaná, was laid out. In 1527 the city of Santa Ana de Coro was founded by an expedition from Hispaniola; but in 1528 Charles V made to the Augsburg banking firm of Welsers a grant of the western part of Venezuela lying between Cape Vela and Maracapana. He evidently hoped that under the new arrangement the region would really be developed and made to pay better, and also that the aborigines would receive more humane treatment. The contract provided that within two years the grantees should establish two settlements, build three forts, and provide fifty German miners for service in Spanish America. In 1529 settlement and exploitation began; but the experiment was a complete failure. The leaders at Coro were thrust aside and the settlement was converted into a market for the sale of aborigines, the treatment of the natives rapidly grew worse rather than better, and quarrels developed between the German leaders and the authorities in Hispaniola. The only good that came from the grant was the exploration of the Orinoco valley and the territory to the west of it. In a few years the contract with the Welsers was revoked, and in 1556

Charles V reassumed full control. Soon afterwards began the conquest and settlement of Venezuela by the Spaniards; and in 1567 Diego de Losada founded the present capital, which he named Santiago de León de Caracas.

Despite the Spanish designs upon the wealth of the Incas, which were roused when Balboa was governor of Darién, exploitation of it did not begin until twenty years later. A serious preliminary effort was made in 1522, however, by Pascual de Andagoya, who sailed down the Pacific coast of South America to a point somewhat beyond what is now called the gulf of San Miguel, in the northern part of the present republic of Peru. Here he landed and advanced into the interior of a territory called Birú (Peru), fighting with the aborigines as he went, and heard definite reports of the power and wealth of the Incas, just to the south.

Ill health prevented him from carrying out his plans for the conquest of the Inca empire, and therefore Pedrarias, under whom he had acted, handed over the undertaking to Francisco Pizarro, an illiterate Spaniard of very humble origin who had accompanied Balboa when he discovered the South Sea, but in the quarrel between Balboa and Pedrarias had sided with the latter. It was now agreed that Pizarro should associate with him another humble Spaniard, Diego de Almagro, and also Hernando de Luque, a priest who had spent some time on the Isthmus of Panama.

They borrowed some money on the Isthmus, but at first the equipment of the expedition was very inadequate. Seven years were spent in preliminaries to the conquest, during which all concerned suffered physical hardship, worry, and disappointment; but the leaders, especially Pizarro, showed a persistence worthy of Columbus. During the period of preparation they made two voyages down the coast of South America and saw enough gold to make them credit the stories they had heard of great wealth in the interior. The second expedition went considerably farther than that of Andagoya, and came into contact with the subjects of the emperor of the Incas. It was quite evident from what the leaders learned concerning the emperor's power that it would be less than useless to attempt conquest without vastly greater forces. Pizarro therefore went to Spain to secure royal support, taking with him as evidence of good faith some Peruvian llamas and gold. Charles V was impressed; and a capitulation was drawn up between the humble adventurer and the crown, giving to Pizarro and his two associates the right to conquer and settle territory stretching for two hundred leagues south of the Gulf of Guayaquil. Pizarro was made adelantado, governor, and captain-general of the region, with a handsome salary. His two partners were to have positions of lower rank and correspondingly smaller salaries. Various inducements were offered to settlers, and it was specifically stipulated that the aborigines should be well treated. Indeed, Luque, who was given a bishopric, was made official "protector of the Indians."

Pizarro left Spain with a small group, including three of his brothers, who were willing to participate in his proposed adventure. At Panama he increased the size of his party, and in January, 1531, he sailed from there for the south with a total of about one hundred and eighty men and twenty-seven horses. After some delay he reached the Gulf of Guayaquil, where he waited for reënforcements, in the meanwhile learning all that he could about the condition of affairs in the Inca empire.

With great satisfaction he heard that the land of gold that he aimed to conquer was torn by internal strife; in fact, perhaps not for two centuries had the situation been more favorable to conquest from outside. The late Inca, Huayna Ccapac, had divided his realm,—an apparently unprecedented action in the empire,—giving to his eldest son, Huascar, the main, or southern, portion and to Atahualpa, the child of a concubine, the Quito section in the north which the Inca had added during his reign. The reason for the division is not certain; but Atahualpa's mother was said to have been of the royal line of the Quitus, who may have been given a ruler of their own blood to insure their loyalty. Furthermore, before his death the old Inca heard with misgivings of the activities of Pizarro along the coast, and possibly hoped by this arrangement to make the defense of the empire easier. If so, he reckoned without the tendency of heirs to quarrel over their inheritance; and such a quarrel took place almost immediately. The younger brother marched down from the north, captured Cuzco, imprisoned Huascar, and helped himself to all the southern part of the realm; but the arrangement was far from satisfactory to the leaders of the older section, which was consequently seething with dissatisfaction and resentment. This was the state of affairs over which Pizarro and his followers rejoiced.

Since Pizarro was quite willing to have Atahualpa's enemies work for him, he was in no hurry to leave his temporary headquarters in the Gulf of Guayaquil. Even after Hernando de Soto, who later discovered the Mississippi River, had arrived with additional horses and troops, Pizarro remained in the region for some months. During this time he founded the town of San Miguel, gathered articles of gold which he used for paying off loans secured at Panama, and kept in touch as best he could with political and military developments under the usurping Inca, to whom he sent word by a native messenger of a projected visit of respect. In the autumn of 1532 he set out over the mountains to the northern headquarters of Atahualpa, taking with him a small army, including about sixty cavalry. The Inca, possessed of large military forces and ignorant of the superior weapons of the enemy, was little impressed with the envoys of the invading expedition, who told of the might of Charles V and the extensive dominance of the Christian faith. Consequently Pizarro decided to make him a prisoner, an idea which was probably borrowed from Cortés's treatment of Moctezuma; for, as Roger B. Merriman has pointed out, Cortés and Pizarro were both in Toledo in 1528, during Pizarro's visit to Spain to get royal aid.

A formal conference was arranged, to be held in the great square of Caxamarca, a city between Quito and Cuzco, where Atahualpa happened to be at the time. To the meeting came the Inca, richly dressed and proudly seated upon a gold throne, which was carried on a litter embossed with silver and gold and lined with the brilliant plumage of tropical birds. In the square were gathered thousands of his subjects. Pizarro's Dominican chaplain, Vicente de Valverde, was spokesman for the Spaniards, and through an interpreter gave Atahualpa a long exposition on the Christian religion, from the creation and fall of man to the plan of redemption and the functions of the Pope at Rome. He closed by urging the Inca to accept Christianity and to become a vassal of the king of Spain. Atahualpa indignantly replied that he was greater than any other prince on earth and would be no man's tributary. Neither would he exchange old deities for new. In his opinion the God of the Christians was very weak, else he would not have permitted himself to be crucified, and would not have died. "My god," said he, pointing to the sun, "still lives in the heavens and looks down on his children." The Bible, which the Dominican priest cited as his authority, the emperor threw contemptuously to the ground, and he threatened to hold the Spaniards to account for the wrongs they had committed in the land.

In the view of Valverde the Inca by his attitude cast away his last chance for freedom, and therefore the priest urged attack, promising absolution to all who died in battle. Pizarro acquiesced, the signal was given for firing, and the Spaniards plunged into the fray, shouting "Santiago! Santiago!" What took place was not a battle, but a massacre: the aborigines fell in the square by thousands, whereas not a Spaniard lost his life. From his golden throne Atahualpa watched the slaughter in dismay and astonishment; near the end he was taken prisoner, after his faithful nobles had been cut down around him.

After Atahualpa had been a captive of the Spaniards for some time it occurred to him to secure release by catering to the greed of the invaders; therefore he offered Pizarro, in return for liberty, enough gold objects to fill to the height of nine feet a room about twenty-two feet long and seventeen wide, and enough silver to fill a smaller chamber twice. The Spanish leader agreed, and gave two months for the collection of the ransom. Royal orders followed for stripping the temples and palaces of their ornaments and utensils to secure the needed quantity of precious metals.

Huascar, Atahualpa's deposed half brother, heard in his prison of what had taken place, and planned to offer the Spaniards an even greater ransom for *his* freedom. Word of this move reached Atahualpa, who was alarmed by its possibilities, especially since Pizarro had declared his intention to sit in judgment upon the controversy between the two brothers over the imperial throne. Hence, at Atahualpa's orders, Huascar was put to death.

The surviving Inca had deceived himself in thinking that he could purchase his freedom; for Pizarro seems to have had no intention of releasing him, and merely agreed to the arrangement regarding the ransom as a highly convenient method of gathering the treasure for which he came to Peru. After the precious metals, amounting to perhaps five million dollars, had been brought in and Pizarro had declared them to be adequate, they were melted down and divided among the Spaniards, who quarreled over their shares like spoiled children.

The imprisoned monarch, who had in the meanwhile remained in durance, was a serious liability to the looters of the realm, and therefore Pizarro decided to get rid of him. His chief pretext for doing so was the persistent rumors of a plot for a general rising against the invaders. Atahualpa denied all knowledge of the matter; but he was formally charged with inciting the rebellion, as well as with a number of other offenses and crimes, including idolatry, polygamy, and the murder of his brother. At the farcical trial that followed, Pizarro and Almagro (who had recently come from Panama with reënforcements) presided; and the Inca was speedily found guilty and condemned to be burned at the stake. At the last moment, however, the sentence was changed, for the zealous Fray Valverde promised the easier death by the garrote if the royal prisoner would accept Christianity. Atahualpa, whose faith in his sun god had been badly shaken by the calamities which the latter had permitted to befall him, consented and was baptized Juan de Atahualpa in honor of John the Baptist. Shortly afterwards he was strangled to death, "while the Spaniards," says Prescott, "gathering around, muttered their *credos* for the salvation of his soul!"

Though both the contestants for the throne were now eliminated, Pizarro felt that it would be politic to keep up for a while the semblance of Inca authority. He therefore selected a younger brother of Atahualpa as heir to the throne, and started with him for Cuzco; but the puppet ruler died on the way and was soon replaced by Manco, a brother of Huascar, who diplomatically went out to meet the Spaniards as they approached the capital and asked their protection. Manco was solemnly crowned in 1534; but the ceremony was an empty form, as was soon evident from the facts that Cuzco was made a Spanish municipality, elaborate plans were laid for the spread of the Christian doctrine, and the invaders proceeded to strip the public buildings of their precious metals. Since comparatively little treasure had been carried away from the capital in the effort to ransom the Inca, the Spaniards made a rich haul there. According to the statement of Pizarro's secretary, two hundred and sixty loads of gold and twenty-five of silver—each load being carried in a litter borne by four Indians—were collected in and around Cuzco. After the loot was distributed, every Spaniard getting some, there followed a wild orgy of gambling and general extravagance, with soaring prices, such as marked the days of the gold rush in California.

The empire of the Incas did not, however, lie absolutely conquered and prostrate. Even the docile rank and file of the aborigines were capable of choosing between the old order and the new, and the survivors of the Inca aristocracy soon grasped the limitations of the invaders; so the puppet ruler Manco proceeded to plot for the recovery of his rightful heritage. Early in 1535, while Pizarro was on the coast founding Lima, the young Inca escaped from Cuzco, raised the standard of revolt, and soon laid siege to the capital. What the aborigines lacked in efficient military equipment they to some extent made up by their overwhelming numbers, and it was not until late the next year that the Spanish tenure of Cuzco was made certain through the timely arrival of fresh forces under Almagro, who had been sent southward by Pizarro to explore. For many years afterwards Peru remained in much confusion, partly because Manco remained at large, constantly plotting to harass the enemy, and partly because of lack of unity and harmony among the invaders. The Pizarro brothers quarreled among themselves and with Almagro over the division of territorial jurisdiction; Almagro was executed in 1538 by order of Francisco Pizarro, who three years later was assassinated by Almagro's son, and young Almagro was in turn put to death by the new governor sent out by Charles V. This early period of Peruvian history is a wretched and depressing story.

From the wreck of the Inca empire exploring and conquering expeditions went out in various directions. One of these, led by Belalcázar into Colombia in search of El Dorado, has been mentioned. The governorship of Quito, which that adventurer vacated, was soon given to Gonzalo Pizarro, brother of Francisco, who instructed him to use his capital as a base for exploration and conquest of a land to the east said to be rich in forests of cinnamon trees. Hence late in 1539 Gonzalo set out on his quest with a party of more than three hundred Spaniards (all of them apparently mounted), thousands of Indians, llamas to carry supplies, and a drove of pigs for food. Almost from the outset they experienced hardships. The Indians whom they encountered were hostile. In crossing the eastern Cordillera some of the men died of the cold. Food became scarce. After the expedition reached the basin of the Amazon rain was almost incessant, illness beset many, and progress was almost halted by the matted character of the jungle. In this region cinnamon was found in limited quantities, but it was impossible to gather it and transport it out of the region. The food problem continued very serious, and those who were well had little but roots and herbs to eat. On a branch of the Napo River, which flows into the Amazon, the wanderers built a boat, using nails forged from the shoes of the horses killed for food. In it, a little later, Pizarro sent forward Francisco de Orellana with fifty men to search for a larger river ten days distant, where the Indians told them plenty of food and gold would be found.

The small party made rapid progress down the stream; but at the end of three days no food had appeared, and Orellana began to fear that it would be impossible to return against the current—a sentiment doubtless nourished by an ambition which he had developed to follow the river to salt water and perhaps gain fame and fortune on his own account. It was not easy, however, to induce all his men to agree to break faith with Gonzalo Pizarro; but opposition to the plan seems to have been quashed by turning loose in a particularly formidable part of the jungle Hernando Sánchez de Vargas,[1] the young cavalier who was leader of those unwilling to desert. Here he was finally found by Gonzalo Pizarro. After unspeakable hardships the two got back to Quito in 1542 with about half the original number of men.

Orellana and his party meanwhile went on down the Napo, and finally, after being long at the point of starvation, found food. On the stream into which the Napo flowed, they encountered very hostile Indians, the women in some places fighting with the men. "On this account," says Garcilasso, "and to make his voyage the more wonderful, he said that it was a land of Amazons"; and the name (later given the singular form in English) was applied to the great river itself. Since their boat would not do for ocean travel, the adventurers built another in the jungles of the Amazon, and in it the voyage was continued, salt water being reached late in August, 1541. Orellana then sailed northwestward to the coast of Venezuela. Later he proceeded to Spain, where he readily secured a commission to conquer and govern the region that he had discovered; but he died on the way back to the land of the Amazons, and nothing was accomplished there by his followers.

Even before Orellana had reached the mouth of the Amazons' River, other expeditions from Peru had begun the occupation and colonization of territory which came to be called Chile but was first known as Nueva Estremadura. On his expedition to the south Almagro penetrated into the region, but he was searching for gold and did not attempt to occupy it. Hence Francisco Pizarro was glad to grant the request made by one of his officers, Pedro de Valdivia of Estremadura, for permission to conquer and settle the region. Valdivia was a man of ambition and ability, and probably of more character than most of the Spanish adelantados in the New World. He supplied his own forces and a modest equipment, and in 1540 left Cuzco and advanced into Chile over the desert. In the valley of the Mapocho River, at the base of a hillock which he called Santa Lucia, he set up his camp and took possession of the land in the name of the king of Spain. Colonization followed rapidly. The first settlement, Santiago de Nueva Estremadura (later the capital of the Chilean republic), Valdivia himself laid out in February, 1541, on the banks of the Mapocho. Within the next dozen years were founded La Serena, as a connecting link with Peru, and Concepción, Imperial, Valdivia, Villarica, and Angol in the fertile, forested region to the south. Most of these settlements finally flourished and became permanent, but only after a hard struggle. Had not Valdivia and his comrades possessed much of the fortitude characterizing the New England frontiersman, they would quickly have given up to despair and abandoned their undertaking. Their chief obstacle came from the hostility of the Araucanian Indians, who, though culturally much behind the Peruvian aborigines, had what the latter had long since lost —intense love of liberty, combined with individual initiative and pugnacity. The warfare between Spaniards and Araucanians was even more bitter than that between whites and Iroquois and Sioux in the United States. The early stages of the struggle, during which the Indians were led by their chief Caupolicán, are described in the poem "La Araucana," by Alonso de Ercilla, a Spaniard who participated in the conflict and developed much admiration for the aborigines. Farms and towns, including Santiago, were repeatedly wiped out by the desperate natives, who clearly saw that as the invaders increased they themselves must decrease. For a century the Indian menace remained constant; and bloody encounters, at times provoked by white oppression, were frequent. Finally, partly through the influence of a Jesuit priest, Padre Valdivia, a more conciliatory policy was adopted; and in 1641 the compromise treaty of Quillén was made. This left to the Indians the whole of the land south of the Bio-Bio River, just as the trans-Mississippi region was looked upon for many years as Indian country. The arrangement secured a greater degree of peace for a time; but occasional hostilities occurred, usually (as in the United States) because of the aggressions of the whites. Despite the long conflict between the two races, much mingling of blood took place, producing the energetic Chilean type.

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[1] The Peruvian chronicler, Garcilasso de la Vega, says in one place that Sánchez de Vargas, "with the constancy of a true gentleman, had insisted on being left behind," which may have been the case.—"The Expedition of Gonzalo Pizarro to the Land of Cinnamon, A.D., 1539–1542." Hakluyt Society Publications, Vol. XXIV, pp. 14–15. Translated and edited by Clements R. Markham.

The first serious attempt to penetrate and occupy the drainage basin of the Plata was made, but without success, by Sebastian Cabot (son of John Cabot, the Venetian explorer), who succeeded Solís as pilot-major of Spain. Cabot was authorized by Charles V to sail westward and discover "the Moluccas, Tarsis, Ophir, Cipango, and Cathay," and in 1526 he set out with four vessels provided by the king. It appears that the expedition was instructed to go by way of the strait discovered by Magellan unless a passageway through the southern land mass could be found farther to the north. In the region of Solís's river Cabot found three survivors of the Solís expedition who gave alluring reports of the wealth of gold and silver which could be had in the interior—evidently describing the Inca empire far to the west. Hence, like many another of his fellows, Cabot boldly ignored his instructions and proceeded to explore the great drainage system of southeastern South America. Because of silver trinkets obtained from the aborigines in the region, he optimistically gave the name Rio de la Plata (river of silver) to the great estuary discovered by Solís. Cabot founded a settlement, which he named San Espíritu, on the lower part of the Paraná and explored that stream as well as the Paraguay for considerable distance; but the Indians on the latter river were hostile, making it impossible to search for riches in the mountains to the west. When Cabot returned to Spain in 1530 he was banished to Africa, and his little colony was abandoned.

Soon afterwards news of Pizarro's exploits in Peru created great excitement in Spain, and there was no lack of persons willing to undertake expeditions to the Plata region at their own expense in the hope of finding another land of gold or of somehow sharing in the wealth of the Incas. One of these, Pedro de Mendoza, a Basque, secured from Charles V a grant of two hundred leagues of territory extending along the coast from the Portuguese possessions southward and for an indefinite distance into the interior. Of this region, which he was to settle at his own expense, he was made adelantado and governor, but with the stipulation that he erect three forts in the region and also seek out a route by land to Peru. The expedition, which included several hundred Spaniards and a considerable number of Austrians, Flemings, and Saxons from Charles's northern realms, reached the Plata early in 1536. A few months later, a fortified town named Santa Maria de los Buenos Aires was laid out on the site of the present Argentine capital. On the Paraná, near the ruins of Cabot's settlement, Juan de Ayolas, one of Mendoza's officers, built a fort called Corpus Christi, which became a base of expeditions sent out in various directions. One of these, led by Ayolas in 1537, proceeded westward, actually reached eastern Peru, and secured a rich treasure of precious metals; but on its return trip the expedition was wiped out by Indians. Mendoza had already died, on his way to Spain. The fortress built on the left bank of the Paraguay (perhaps by Juan de Salalzar of the Mendoza expedition) became the nucleus of Asunción, the first permanent settlement in the interior of South America. The inhabitants of Buenos Aires, beset by disease, famine, and hostile Indians, soon abandoned the place, some returning to Spain and others moving up the river to Asunción. The latter, isolated in the wilderness and cut off from Europe, elected as governor Domingo Martínez de Irala and proceeded to mingle with the Guaraní and other neighboring Indians and to reduce some of them to serfdom. Irala, with one brief interruption, controlled the colony from 1539 until his death in 1556.

This interruption was occasioned by the arrival of Alvar Núñez de Cabeza de Vaca, whose adventures in North America some years earlier have been mentioned. Since the colony of

Buenos Aires was known in Spain to be in a bad state, Cabeza de Vaca was made adelantado and governor of the territory granted to Mendoza, with instructions to reënforce the settlement at the mouth of the Plata. In 1540 he set out from Spain, and after a stormy voyage reached the island later called Santa Catharina, off the southern coast of Brazil. The untracked wilderness had no terrors for this veteran explorer, and he therefore sent his vessels to the Plata while he with a portion of his men cut across the land toward the colony headed by Irala. After a difficult and perilous journey, during which he discovered the magnificent falls of the Iguassú, Cabeza de Vaca reached Asunción in March, 1542. But the former residents of Buenos Aires refused to return to the Plata, and the strenuous and efficient policy adopted by the new governor was no more welcome to the white inhabitants in general than to Irala, whom he displaced. After two years a revolt in Asunción overthrew Cabeza de Vaca, who was sent back to Spain charged with a long list of offenses, and Irala was restored to his former position. During the next four decades the Plata estuary was left to the Indians, who had become more formidable through helping themselves to horses brought from Spain by the colonists of Buenos Aires.

Meanwhile numerous settlements from other quarters were made in the northwestern portion of the Plata basin, and were often accompanied by bloody quarrels between rival leaders. Settlers coming over the Andes from Chile in 1553 laid out Santiago de Estero, the first colony in the region; and within the next twenty years Chilean leaders also established Mendoza, San Juan, and San Luis along the foothills of the Cordillera. Meanwhile Peruvian expeditions founded Tucumán, Córdova, Catamarca, Salta, and other towns to the north of these.

But the Plata was the key to the great stretch of territory from the Andes to the Atlantic, and its occupation was important. This fact was realized by Juan de Garay, a Basque of noble blood and unusual ability who had spent some years in South America, and consequently he planned for its colonization. He first built on the lower Paraguay in 1573 a strong settlement called Santa Fé, with people from Asunción who were used to life in the wilderness. This gave the white element a hold in the region of the Plata. In 1580 Garay, who was now lieutenant governor of the territory first granted to Mendoza, led another expedition of frontiersmen from Asunción, this time laying the foundations of the present city of Buenos Aires. The settlement withstood the attacks of the aborigines and prospered from the first.

Thus, within less than a century after Columbus's first voyage westward, intrepid Spaniards had laid the bases for the far-flung New World realm known as the Indies. The region had been explored in a broad manner, its most powerful aboriginal groups had been conquered, and fortified settlements had been made at strategic points in an effort to hold the land against all enemies.

ESTABLISHMENT OF PORTUGUESE CONTROL IN SOUTH AMERICA

Preoccupation in Asia caused Portugal at the outset to neglect its territory in the New World, for the latter seemed to offer very little material advantage in comparison with the rich Orient. During the first quarter of the sixteenth century no official occupation took place in that part of the southern continent named Santa Cruz by Cabral; it was visited by foreign as well as Portuguese vessels bent upon gathering the dyewood known as *brasil*, which in time gave the region its permanent name. In this enterprise the French were especially active; for the nations that had no share in the partition treaty of Tordesillas showed little respect for its provisions. Though no formal or official colonization took place in these early years, here and there on the long stretch of coast there gradually developed tiny scattered Portuguese communities, made up largely of deserters and mutineers from vessels and convicts and other undesirable subjects annually dumped by royal officials; but there was also a small redeeming element in the form of a few sturdy families from the Madeiras and northern Portugal who settled down and engaged in farming.

The French activities in the north and Cabot's explorations in the Plata basin were what first roused the Portuguese crown to greater interest in the territory. In 1526 João III began the practice of sending fleets to patrol the coast and to give battle to the foreign vessels found there. Reports which came shortly afterwards of the vast riches of Peru, combined with the discovery of small but encouraging amounts of gold in Brazil, started a real tide of Portuguese immigration toward Brazil and led King João to establish formal control. The first governor, Martim Affonso de Souza, was sent out in 1530 and at once started on an extensive tour of the settlements. He found that neighboring communities had united into small, sketchy states, each of which elected from its population a "captain" who was leader in warfare against the hostile aborigines and was chief authority in other matters of general interest and welfare. There was no system of taxation, and in individual concerns each man was a law unto himself. Under Souza's advice the Portuguese government decided not to risk antagonizing these pioneer colonists by introducing a new system and new officers. Colonization under royal grant was begun promptly, however; in fact, the first settlement made by governmental authority was laid out early in 1532 by Souza himself. This was São Vicente Piratininga, in the present state of São Paulo.

The colonial policy first adopted by Portugal for Brazil was modeled after a system long established in Madeira and the Azores, from which the earliest Brazilian pioneers had borrowed some of their ideas for organization. The coast from São Vicente to the mouth of the Amazon was divided into fifteen strips called "captaincies," each nominally fifty leagues wide and extending inland as far as the theoretical line of demarcation which set off Portugal's possessions from those of Spain. These territories were granted to persons known as donatories, or captains, who were required to make certain payments to the crown; but within their vast strips of territory they were given practically complete authority, and their rights, like those of feudal lords, were hereditary. The captains could distribute land, could appoint local officials, and could trade freely with the Indians; but they were prohibited from coining money and from imposing the death penalty.

A few of the captaincies were never made use of by their owners and reverted to royal control. But, despite hostile attacks of the aborigines and other handicaps, about half a dozen grants, besides São Vicente, were soon settled by their donatories. Of these Pernambuco, stretching northward from the São Francisco River, was the strongest and one of the earliest. Its captain, Duarte Coelho Pereira, who received the territory as reward for services in India, came out in 1535 with his family and a large number of other connections and laid out the first town, Olinda. He successfully defended the settlement against the Indians, who were egged on by the French traders frequenting the region, and it soon began to prosper. In the same year another Portuguese who had won wealth and fame in India, Vasco Fernandes Coutinho, likewise settled an important captaincy, Espírito Santo, to the north of the present city of Rio de Janeiro. The name of the first town laid out in the captaincy was also Espírito Santo, but was later changed to Victoria in honor of a victory over the aborigines. Owing to the oppressive methods of Coutinho and the fierceness of the Indians, the settlement was abandoned after a while; but some of the colonists later returned, Victoria took on new life, and the captaincy was extended to the north to include the bay of Espírito Santo. The other early captains fared less well—one of the most unfortunate being the historian João de Barros, who, with two partners, undertook to settle Maranhão. Ten ships carrying the colonists, who numbered nearly a thousand, were wrecked on the shoals a little to the south of the captaincy, and almost all lives were lost. The few survivors finally reached settlements in other parts, but the plan for colonizing Maranhão was, for the time, abandoned.[1]

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[1] Some of the successful early captaincies were aided by individual Portuguese who had lived long on the coast and gained much influence over the Indians. One such pioneer, João Ramalho, was of service to Martim Affonso de Souza. But more famous was Diogo Alvares, who probably was wrecked on the Brazilian coast as early as 1510. Through saving a gun and barrel of powder from the

The region lying between Pernambuco and Espírito Santo, known as Bahia de Todos os Santos (All Saints' Bay) and later shortened to Bahia, was developed and given prominence as a result of the determination of the crown to centralize the scattered captaincies in the interest of law and order as well as for their better protection against pirates and other marauders. Thomé de Souza, who likewise had seen service in Asia, was made captain-general with much of the political authority until then enjoyed by the local hereditary captains, and in 1549 went out with a considerable military force to take charge of Brazil. In the large Bay of All Saints he founded the city of São Salvador (commonly known as Bahia), which during most of the colonial era was the capital of Brazil. The new settlement was well defended; it prospered from the first and became the nucleus for plantations and other towns which grew up along the neighboring coasts and spread toward the interior.

One of the greatest vexations of the early captains-general was the persistent efforts of the French to gain a foothold upon the Brazilian coast. The scene of the most serious attempt was the magnificent harbor of Rio de Janeiro, so named by the first Portuguese who entered it because he did so in January and mistook the bay for the mouth of a river; but the French, who took possession in 1555 and fortified the islands in the bay, optimistically renamed the region Antarctic France. The interlopers were Protestants sent out under Nicholas Durand Villegagnon by Gaspar de Coligny, admiral of France, who was intent upon finding a refuge for his coreligionists. The Brazilian governor-general of the time was incompetent; but, fortunately for Portugal, the Protestant leaders had a violent quarrel which

wreckage, he escaped the death at the hands of the cannibalistic Indians which befell his comrades, and so impressed the aborigines that they regarded him with something of awe and named him Caramurú, meaning "man of fire." He lived a polygamous patriarchal life among them and had a vast family of half-breed children who became the ancestors of many of the most prominent Brazilians of today. Caramurú (as he was commonly called by the Portuguese) aided in the revival of the town of Victoria in the captaincy of Espírito Santo, and as long as he lived he was very influential in keeping the Indian chiefs along the middle portion of the Brazilian coast friendly toward the whites.

weakened the colony, and Mem de Sá, a new representative whom the Portuguese crown sent out, was able to destroy Fort Coligny in 1560 and drive out the French. They soon returned, however, and restored their fortifications. In 1567 the governor-general again drove them out; and to insure Portuguese possession a city was built in the harbor and named São Sebastião do Rio de Janeiro (later shortened to Rio de Janeiro) in honor of the saint on whose feast day the victory was won.

Of more lasting effect than the Huguenot invasion was the sixty years' Spanish "captivity" of Portugal and her colonies, which began in 1581. During the period Brazil was, on the whole, neglected by the captor; for the colony was believed not to possess any mineral wealth of importance. Partly because of this, Brazil became the prey of Spain's enemies. English freebooters harrassed various coast towns; the French established themselves on the island of Marajo in the estuary of the Amazon and there remained for several years; and the Dutch, Spain's bitterest foes, after seizing Portugal's choicest colonies in the Orient, strongly intrenched themselves on the coast. Their activities in South America were in the hands of the Dutch West India Company, which finally gained control of a stretch of the eastern extremity of Brazil including seven captaincies. Of these the most important was Pernambuco, the capital of which, Pernambuco City, was made the Dutch capital and renamed Mauriceburgh for Count Maurice of Nassau, the able and ambitious governor sent out by the company in 1637. The invaders maintained control by means of many fortresses, a considerable army, and a fleet of about ninety vessels.

Count Maurice's dream of empire in South America was soon shattered, however, for it failed to reckon with the national spirit in Portugal and Brazil. Spain's rule over her captives was marked by haughty oppression and broken faith, leading the Portuguese in 1640 to undertake a revolt. The revolt was successful, and was followed the next year by the coronation of the duke of Braganza as King João IV. When news of this reached the Portuguese viceroy of Brazil at Bahia, he recognized the new king, first ascertaining that such action would be acceptable to the Netherlands, for the Dutch were too near and too powerful to be offended needlessly. Furthermore, the comparative weakness of Portugal and the danger of reconquest by Spain led the former to sign with the Netherlands a treaty of alliance and ten years' truce. The arrangement was highly unsatisfactory to the Brazilians, however, some of whom had already planned for complete independence when news of the overthrow of Spain came in 1640. Conspiracy against the Dutch usurpers began in Maranhão, and in 1642 war was there proclaimed against them. It spread steadily and met with encouraging success. The chief leader in the struggle for the restoration of Brazilian control was a prominent sugar-planter, João Fernandes Vieira, commander in chief of the revolutionary armies. Further encouragement came to the Brazilians from the resignation of Count Maurice in 1644, to be succeeded by a man of less military ability. The following year successful revolt broke out in Pernambuco itself, and soon afterwards Vieira was proclaimed governor of that province.

Though João IV of Portugal had been following events in Brazil with secret pleasure, when the Dutch government demanded that the armistice be observed he naïvely ordered the Brazilians to stop fighting. The war continued, however, with increasing victories for the insurgents; and in 1650 the mother country began to give definite aid. In January, 1654, the Dutch forces gave up their last stronghold, Recife, and withdrew from Brazil, but it was not until 1661 that assurance was gained that the enemy would not return as soon as chance offered. In that year a treaty was signed between Holland and Portugal whereby the former gave up all claims to Brazil in return for cash indemnity and certain commercial concessions.

V

POLITICAL ADMINISTRATION OF THE SPANISH INDIES

—I have seen corruption boil and bubble
Till it o'errun the stew.
Measure for Measure, Act V, scene i, line 320

THE Indies did not belong to Spain as a whole. At first they were looked upon as the hereditary possessions of the crown of Castile,—an attitude partly resulting from Isabella's aid to Columbus. It should be recalled, furthermore, that they lay to the west, where it had been early agreed between Castile and Aragon that the former should have a free hand in winning territory by force of arms, and the latter should have liberty to expand northward and into the Mediterranean. Hence for almost a century Spanish activities in the Western Hemisphere were largely restricted to subjects of Castile and León. It would seem natural, therefore, that the political methods and institutions of Castile should be those transferred to the Indies. But Roger B. Merriman is of the opinion that the Spanish sovereigns preferred that Castilian models be followed because the western part of Spain had been brought much more fully under royal control than had Aragon, where there still existed liberties and a spirit of local autonomy which might prove contaminating to the colonies.

Spain's political administration of the Indies, which showed a growing and changing policy, was, in view of the period, unusually wise and efficient. The sovereigns, in general, gave more study to the subject than did the rulers of other colonial powers. Moreover, they set about their task with six centuries of experience upon which to draw; for in holding and governing the territory won in the religious wars in the Iberian Peninsula and in the later conflicts in the Mediterranean and the Canaries they had had to deal with various problems akin to those later found in the New World. As has been already indicated, many elements in the political system of Castile developed in connection with the administration of frontier districts populated by conquered non-Christian people; hence the system was rather suited to the American dominions, where it was introduced. Substantially every institution and office found in the Indies had its model in Castile; but changes in form and function developed to suit local needs or to meet the handicap of the great distance of the colonies from the royal headquarters. In general, therefore, Spain and the Indies shared the same political evils and enjoyed like advantages. During more than three centuries the two were held together by a thoughtfully adopted governmental machinery, which could have survived much longer; it was not the political system that was primarily responsible for the final break between Spain and her New World empire, but an unintelligent economic policy.

In the Indies, as in Spain, the sovereign was the supreme governing authority; but, thanks to the divine-right absolutist trend of the sixteenth century and the lack of more liberal traditions in the New World, the royal will was even more strongly impressed in that region than at home. At first the Catholic kings had a mere handful of men in Spain to assist in connection with the colonies; but as the colonies grew, a large administrative body developed, headed by the Royal and Supreme Council of the Indies. This body may be said to have had its remote origin in the appointment, in 1493, of Juan Rodríguez de Fonseca, archdeacon of Seville, to help Columbus in preparing for his second voyage. After the admiral had sailed the sovereigns gave Fonseca other duties connected with the new territories; thereafter, for about thirty years, he and his subordinates, working in close touch with the crown and the council of state, administered colonial affairs. As duties increased, the personnel of the group (commonly called the Council of the Indies) expanded; and in 1524 it was organized separately from the council of state, with García de Loaysa, Charles V's Dominican confessor, at its head. By the middle of the century, when the organization attained its characteristic form, it had, in addition to the president, a number of officers of major importance. These included a grand chancellor for the Indies, a crown prosecutor, two secretaries, and eight councilors, who must be "proven in morals, nobility, and purity of lineage, fearing God, and eminent in letters and prudence." Among the minor officials were included a mathematician and a cosmographer-chronicler. For the major offices, in particular, an effort was made to select men who had had experience in the Indies.

The Council of the Indies was a hard-working body, since, in coöperation with the sovereign, it had complete responsibility for all matters connected with the colonial possessions of Spain. Hence its functions were legislative, judicial, and administrative, or executive. As a general legislative body for the Indies the council at first limited itself to selecting from the laws of Spain such parts as seemed to suit the requirements of the transatlantic realms; but as the need grew, it began more and more to enact special decrees for the latter, and in 1680 these were codified as the "Laws of the Indies." These colonial regulations were concerned with every aspect of the duties, rights, and responsibilities of the inhabitants of the Indies, and of the officers, high and low, who functioned in them. Occasionally the laws dealt with very petty matters, the classic example being one providing for the appointment of dog-chasers to drive stray canines out of colonial churches. Though in some cases vaguely phrased and in others harsh, the Laws of the Indies were on the whole wise and humane for their time.

In three ways the Council of the Indies acted in a judicial capacity: to it the colonial-born living in Spain must bring all their suits; to it, as the court of final appeal, came cases from the highest tribunals of the Indies; and it also acted as a court in the first instance in certain cases of major importance.

But the administrative and executive functions of the council were the most important of all. In consultation with the crown, it created territorial units and political offices; it appointed and removed most of the colonial functionaries, temporal and spiritual, from the viceroys down; and, by means of a vast correspondence, it sought to keep in touch with and control these appointees. Under its supervision those accused of maladministration were tried and punished. Under its care were placed the millions of aborigines, whom it sought to protect from exploitation and to bring within the fostering fold of the Church. It was also responsible for the Indies as a royal business investment, through having general supervision of the *Casa de Contratación*, or House of Trade, which controlled colonial commerce and related matters.

Such, in brief, was the central portion of the colonial government—the part which, located in Spain, provided for and steered the elaborate machinery of control built up in the Indies. This centralizing organization, the Council of the Indies, functioned for three centuries, and survived until after the wars for Spanish-American independence had almost deprived it of excuse for existence; but it was much weakened after 1714, when a minister of the Indies created by the first Bourbon king took over many of its duties.

At first the working machinery of government in the colonies was simple. Though Columbus, before his first voyage, was created viceroy and captain-general of all lands which he might find, his administrative functions in the Indies—which were soon taken away—were primarily concerned with the founding of towns and setting up governmental machinery for them. This was true of the many other early explorers and adelantados. Hence the municipality may be considered the first and basic political unit of the Indies. The towns or cities, like the city-states of the Middle Ages and the New England towns of today, often had extensive territory and included much rural land. Their boundaries were usually vague, and were assumed to extend to the limits of the next municipality,—wherever they might be,—a state of affairs which, when population became more dense and land less plentiful, frequently led to bitter quarrels between municipalities. Because of the large areas they claimed in the early colonial period the municipalities were in some cases practically identical with the provinces in which they were assumed to lie. Theoretically, the aborigines came under the jurisdiction of the towns. If they paid tribute, however, they were permitted to live under their tribal laws, though their right to occupation of the soil—conceded to Indians in the United States of America—was never formally recognized by the Spanish crown.

The type of town government established in the Indies at first followed that of the earlier, freer period in Castile. The *cabildo*, as the municipal council came to be called in the New World, commonly had from six to twelve members, usually appointed at the outset by the conqueror or adelantado who laid out the town and later elected by men of standing among the inhabitants. This right of election was specifically granted by Charles V in 1523 and was for some time preserved. Consequently, throughout the sixteenth century many of the towns of the Indies, perhaps most, elected their own officers. But gradually this privilege disappeared, sometimes through a local decision to make the office hereditary, but more often because the members of the cabildo took to themselves the right to fill vacancies in their body by appointment or by selling the office at public auction.[1]

The cabildo and other town officers (commonly appointed by it) had legislative, executive, and judicial powers connected with the municipality; but the governor or other royal officer of the province was ex officio president of the council, and the execution of its decisions depended upon his approval or that of some similar officer. This fact greatly limited the power of the town authorities, prevented any development of municipal democracy, and caused friction between the cabildo and the crown's appointees.

Occasionally, however, when important announcements were to be made or matters of general interest involving taxation were to be considered, *cabildos abiertos*, or open cabildos, took place. These general gatherings—sometimes called by the council, and sometimes by spontaneous action of the inhabitants—were similar to New England town meetings in that all had a right to speak and to vote on the resolutions presented; but their action was apparently recommendatory in its effect upon the regular cabildo, rather than binding. In isolated and economically unimportant sections of the Indies, such as the Plata basin, where the towns were left much to themselves, such popular gatherings were more common than elsewhere. Cabildos abiertos assembled repeatedly in Montevideo to consider means of defense from threatened invasion, to vote upon methods of securing money for the rebuilding of a church, and for similar matters. Some of the towns, notably Montevideo and Buenos Aires, secured considerable freedom from the authority of crown officials,—a fact that may perhaps be explained by the influence of the cabildos abiertos. In all there lingered sufficiently strong traditions of freedom to make them finally the foci of the movement for independence.

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[1] In Europe the sale of public office during the period was not a subject of criticism. The great Montesquieu even definitely favored the usage. Though it was unquestionably an evil, it had, as the historian E. G. Bourne points out (in *Spain in America*, pp. 238–239), "many advantages over the practice of paying a heavy assessment to a party machine for a nomination and a chance of being elected," which is found in the United States at the present time.

In their struggles with royal appointees and in other matters involving questions of their rights, the early colonial towns possessed, and frequently exercised, the right to communicate directly with the crown, either by writing or by a special agent, called, as in Spain, a procurador. In the first half of the sixteenth century it became customary for delegates from towns in the West Indies to meet for the purpose of considering common interests and planning joint action in addressing the crown. Here was a nucleus for a colonial Cortes, but the autocratic spirit dominating sixteenth-century Europe did not favor such democratic practices. In 1530 Charles V announced that "without our command it is not our intention or will that the cities or towns of the Indies meet in convention." This ended the conferences, because no royal call for them was issued; and in the Indies the Cortes never developed.

A Spanish institution destined to acquire unusual power and importance in the Indies was the audiencia, first introduced in 1511, when Ferdinand created one in Santo Domingo. The judges were royal appointees. Originally there were only three in this first audiencia, but others were appointed later. In time the jurisdiction of the tribunal was extended over the West Indian islands and Venezuela. As the need arose through occupation of new territory, other audiencias were added, that of Buenos Aires, temporarily established in 1661, being the thirteenth. The name "audiencia" was also applied to the area over which the court had jurisdiction, and every portion of Spain's colonies fell within some audiencia. Though theoretically of equal rank, these tribunals varied much in the number and class of judges in each, the audiencias of Mexico City and Lima, the seats of the oldest viceroyalties, usually excelling in both regards. The presiding officer of the audiencia was the highest administrative authority of the jurisdiction, usually a viceroy, a captain-general, or a president; but he had no vote in judicial decisions.

As courts the audiencias had much power, for they were the supreme tribunals of the Indies and also tried many appellate suits from lower judicial bodies. Only cases involving considerable sums of money could be appealed from the audiencias to the Council of the Indies. From the first the audiencias had original jurisdiction in matters concerning the crown. They were also given special authority in cases involving the aborigines and were active in the investigation of colonial affairs and royal officials.

Unlike their Spanish models, the audiencias of the Indies were not limited to judicial functions. Very early they began to sit as advisory councils of the chief executive within their jurisdiction, who was bound to consult them upon certain questions. These advisory conferences soon developed into legislative sessions; and, though the audiencias were much weakened toward the close of the colonial period, their power to pass laws to meet local needs was never lost. They had also a few administrative duties; for in the absence of a corresponding organization in the Indies they assumed some of the functions performed in Spain by the council of state. They could communicate with the crown quite independently of other royal officials in the colonies; and at times, when the need arose, they even assumed the functions of the viceroy himself.

For general administrative purposes, as opposed to judicial ones, the Indies were organized into units coextensive with the territorial jurisdictions of the audiencias. The viceroy had charge over that in which the viceregal capital lay. Other subdivisions were known as captaincies-general, because they were headed by royal officers, called captains-general, who possessed both civil and military powers. When the chief administrative officer within one of these main political units had merely civil authority, he was known as a president, and the territory under his charge was called a presidency.[1]

As time passed, the Council of the Indies, in coöperation with the crown, created various types of local officials. Some of these, like the later governors, were general administrators of subdivisions of the presidencies and captaincies-general; others, such as the corregidores, were given various special functions only remotely connected with those of like-named officials in Spain. Their duties were largely economic and often included the regulating of weights and measures, the supervision of buildings, and the promotion of agriculture within their *corregimientos*. They also aided in the collection of taxes and were responsible for the gathering of tribute from the aborigines. They were expected to foster trade with the natives, and, in fact, to serve as agents for the Indians, whom they were to protect from unjust treatment by the Spaniards.

Obviously the office of corregidor was not an easy one and offered many temptations. Gross abuses crept in, especially in relation to the aborigines, to whom the corregidor, instead of being a protector and friend, was often an arch enemy. In violation of regulations he himself often traded with the natives, and perhaps more frequently profited from the trade of others with them. Instead of making an effort, by means of commerce, to supply the Indians with needed commodities, he used his office to force upon them, at enormous prices, luxuries and articles for which they had no use. For instance, humble, barefooted aborigines were induced by intimidation to buy silk stockings and silk and velvet cloth; illiterates acquired pens and stationery; and people with sound eyes bought glasses, which they were instructed to wear regularly to church if they desired salvation. In view of such methods it is no wonder that corregidores who came into office as poor men returned to Spain with large fortunes at the end of five years.

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[1] Terms applied to offices were, however, not very distinctive and were often confusing. The title "adelantado," early discontinued in the Indies, seems from the standpoint of civil and military authority to have been synonymous with "captain-general," as does also "governor" as applied to Irala of Asunción, for instance.

Presiding over small subdivisions of the audiencias, the *alcaldías*, were petty officers, *alcaldes mayores*, poorly paid and very numerous. Originally their duties, like those of the audiencias, were wholly judicial; but necessity caused them to be given various administrative functions, which brought them into closer contact with the Indians. The result was oppression similar to that of which the corregidor was guilty, but on a smaller scale.

The office of viceroy, which had long existed in Aragon's Mediterranean possessions, was introduced into the Indies fairly early to meet an obvious need. After three decades of experience with transatlantic rule, it was apparent to the crown that the great political powers given the conquistadores as captains-general or the like tempted them to ignore superior authority, whether local or in Spain. It was also clear that the judges of the audiencias, purely governmental though their interests were supposed to be, would not suffice to uphold the interests and sovereignty of the crown in the Indies. Hence it was decided to add to the local governmental machinery of the colonies a personal representative of the ruler. To overawe ambitious underlings and to prevent the viceroy himself from becoming disloyal, the men selected were to be of high social standing and of proved integrity and ability, to be well paid, and to be surrounded with royal pomp and ceremony.

The first regularly organized viceroyalty in the Indies was New Spain, which for a time included all Spanish territory in the Western Hemisphere. Its capital was Mexico City, and its first incumbent, appointed in 1529, was Antonio de Mendoza, a distinguished Castilian nobleman who set a precedent for high efficiency. Mendoza reached Mexico in 1535 and spent fifteen years at his post; but in 1555 the viceregal term was limited by law to three years—an arrangement not strictly enforced, however. After the conquest of the Inca empire by Pizarro, a second viceroyalty, Peru, was created in 1542, with its seat at Lima. For almost two centuries the king's representative in this capital had varying degrees of authority over the Isthmus of Panama and all Spanish territory in South America except Venezuela, which came under the viceroyalty of New Spain; but the increased complexity of colonial administration caused two new viceroyalties to be established in the southern continent during the eighteenth century. In 1717, partly as a means of protection against aggressions by the English, the viceroyalty of New Granada was set off, with its capital at Bogotá.[1] In a broad way it included the Isthmus and the territory making up the present states of Colombia, Venezuela, and Ecuador. Finally, in 1776 the Plata basin was organized into a distinct viceroyalty, including the territory at present making up Uruguay, Paraguay, and Argentina. The Peruvian settlements to the east of the Cordillera, organized as the province of Tucumán and governed from Chuquisaca in Upper Peru,[2] were now expected to look to Buenos Aires, the capital of the new viceroyalty, rather than to Lima. This was true also of those made from Chile and until 1776 governed from there as the province of Cuyo. The first two viceregal units remained far more important, however, than those of later origin; but in the eighteenth century the viceroy of Peru took precedence over his colleague in Mexico, and his was the most distinguished office in the Indies.

The first viceroys divided between them for a time the jurisdiction over all Spain's possessions in the New World. Later, however, as the problems of government became more complicated and fear of too great viceregal power developed, parts of the viceroyalties remote from their capitals were in some cases made independent of the king's representative, their captains-general or presidents being directly responsible to the Spanish crown. The captaincy-general of Guatemala, which included the present Central American states, was an illustration of this arrangement.

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[1] It was discontinued in 1724 because of the expense of upkeep, but was restored in 1740.

[2] In the region now occupied by Bolivia.

Since the viceroy was the sovereign's personal representative, his duties were legion and his responsibilities great. Naturally he was given much discretionary power; but his specific functions included the nomination (subject to royal approval) of many officials, temporal and ecclesiastical; the prevention of papal meddling; provision for the military protection of his realm and the command of the army; the issuing of ordinances and proclamations; the laying out of towns; the supervision of important public works and of the finances; and the protection of the aborigines and the fostering of their conversion, in the performance of which duty he frequently came into conflict with the corregidor. The viceroy's function as president of the audiencia which met in his capital has already been mentioned. He was also expected to supervise in a broad way the remaining audiencias of his jurisdiction and, indeed, every individual within it as well.

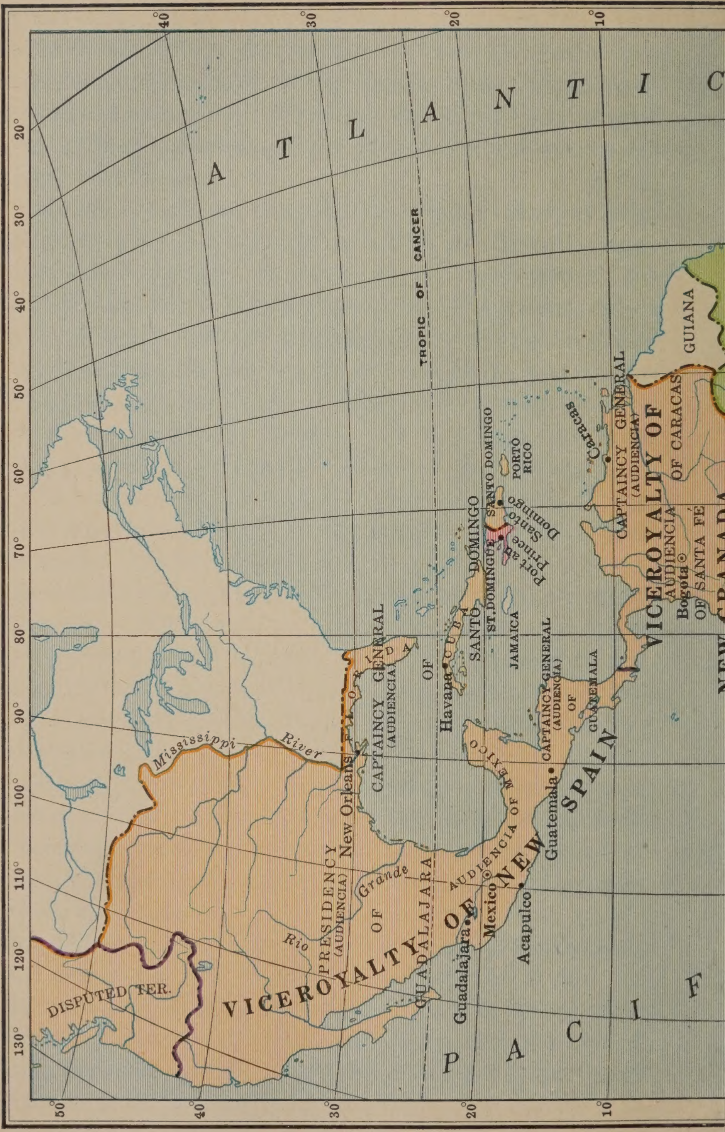
In his extensive labors he secured aid from many quarters. At his command was an elaborate secretariat, commonly headed by two chief secretaries. His audiencia, it will be recalled, served him as an advisory council. To it he likewise delegated certain administrative duties, and others he gave to the cabildos and to individual officials. As was to be expected, the viceroy drew heavily upon the clergy, commonly the best-educated men of the population, and they usually proved his most efficient helpers.

Late in the eighteenth century a very revolutionary change was made in the political machinery of the Indies, partly owing to the oppression of the Indians by local officials. The cruelties practiced against them had more than once caused the aborigines of Peru to turn against their white enemies. The last serious uprising, which took place in 1780, was directed specifically against the local corregidor. The leader of the Indians, Tupac-Amaru, a petty official who was a descendant of the royal line of the Incas, had for his aim the freeing of his people through the expulsion or extermination of the Spainards. This was a futile dream, for the insurrection was soon put down. But the struggle was unspeakably bloody and barbarous; in it many thousands of aborigines were wiped out, including Tupac and all his kindred, whose executions, for purposes of intimidation, were deliberately monstrous.

This uprising caused the crown to investigate carefully local administration in the colonies, which had before been the occasion of much dissatisfaction, and as a result to make general the office of intendant, already introduced from France into Spain and Cuba. The new officers supplanted the corregidores and related functionaries. Each of the four viceroyalties was divided into intendancies (twelve in New Spain, and smaller numbers elsewhere), and over each of these was placed an intendant, whose superior officer in financial matters was the intendant-general, who resided in the capital of the viceroyalty. Under each of the local intendants were placed minor officials, known as *subdelegados* (subdelegates).

The intendants were primarily financial officers having charge of all revenue,—civil, military, and ecclesiastical,—in which capacity they paid public salaries, regulated trade and navigation (including commerce with the Indians), controlled agriculture in some sections, and had charge of crown lands. In their financial functions they were completely independent of all other colonial officials. In addition to their financial duties, the local intendants were the general administrative and judicial heads of their territories, and in this capacity they were under instructions from the viceroys, to whom they must report all appointments which they made.

This important change in the administrative machinery of the Indies cut down the total number of crown officers and curtailed the power of all who remained, from the councilors of the cabildos to the viceroys, who were in sore need of a lightening of their burdens. On the whole, the intendant system made for improvement in the colonial government; for though it introduced some new problems, it did away with some abuses,


ATLANTIC
PACIF
TROPIC OF CANCER
VICEROYALTY OF NEW SPAIN
DISPUTED TER.
PRESIDENCY (AUDIENCIA) OF GUADALAJARA
Guadalajara
Mexico
AUDIENCIA OF MEXICO
Acapulco
Rio Grande
Mississippi River
New Orleans
FLORIDA
CAPTAINCY GENERAL (AUDIENCIA) OF CUBA
Havana
SANTO DOMINGO
ST. DOMINGUE
SANTO DOMINGO
Santo Domingo
Port au Prince
PORTO RICO
JAMAICA
CAPTAINCY GENERAL (AUDIENCIA) OF GUATEMALA
Guatemala
CAPTAINCY GENERAL (AUDIENCIA) OF CARACAS
Caracas
GUIANA
VICEROYALTY OF NEW GRANADA
AUDIENCIA OF SANTA FÉ
Bogotá
20°
30°
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90°
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120°
130°
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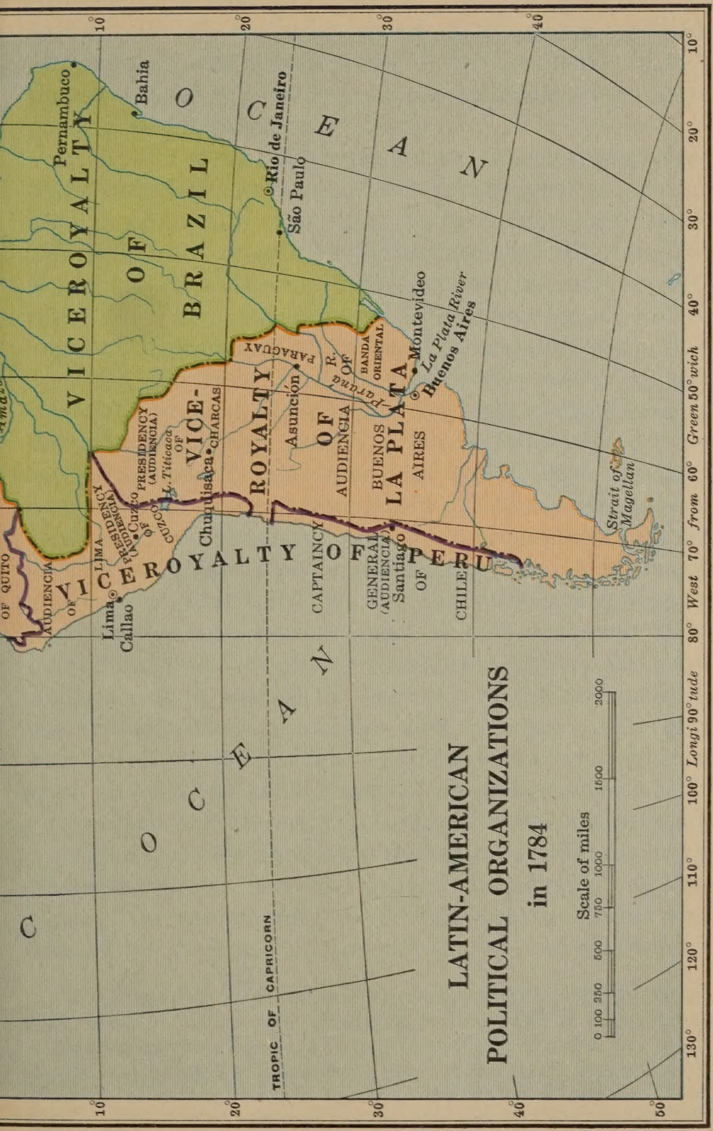

LATIN-AMERICAN POLITICAL ORGANIZATIONS in 1784

VICEROYALTY OF BRAZIL
Pernambuco
Bahia
Rio de Janeiro
São Paulo
OCEAN
VICEROYALTY OF LA PLATA
PARAGUAY
Asunción
R. OF Paraná
BANDA ORIENTAL
Montevideo
La Plata River
Buenos Aires
AUDIENCIA OF BUENOS AIRES
PRESIDENCY (AUDIENCIA) OF CHARCAS
L. Titicaca
Chuquisaca
VICEROYALTY OF PERU
PRESIDENCY (AUDIENCIA) OF CUZCO
Cuzco
LIMA
AUDIENCIA OF LIMA
Lima
Callao
AUDIENCIA OF QUITO
CAPTAINCY GENERAL (AUDIENCIA) OF CHILE
Santiago
Strait of Magellan
TROPIC OF CAPRICORN
OCEAN
Scale of miles
0 100 250 500 750 1000 1500 2000
Longitude 90° West 80° 70° from 60° Green 50° wich 40° 30° 20° 10° 100° 110° 120° 130°
10° 20° 30° 40° 50°

particularly in financial matters and relations with the Indians. As Lillian Estelle Fisher has indicated, the change "infused new life and vigor into a corrupt and decaying colonial administration, and made it possible for Spain to hold its vast American possessions for another half century."

In an effort to maintain loyal, honest, and efficient government in the Indies the crown resorted to various devices—some long used in Spain and others new or given unwonted emphasis. Officials directly responsible to the king, especially the viceroys, were supplied with exceedingly detailed instructions, without which they were not supposed to act; and in all matters of importance, on receipt of the royal orders, they promptly took a solemn and elaborate oath to observe them.[1] Yet officials frequently showed slight regard for such pledges, and often, through independence of spirit or force of necessity, acted without instructions. On the other hand, the viceroys, in particular, were expected to report upon every official act they performed, no matter how minute and trifling—a requirement that tended to paralyze initiative among the conscientious. More important and perhaps more effective was the system of governmental checks and balances, which aimed not only to prevent too much individual power but also to stimulate a vigilant jealousy that would foster in officials the tendency to spy and report upon one another. The relationships already referred to as existing between viceroy and audiencia and between viceroy and intendant—all of whom could communicate independently with the king—illustrate this method. In the same way, temporal officers and Church officers, because of their peculiar interests and separate organizations, served as general checks upon one another. Finally, the crown early introduced into the Indies the old Spanish institutions of the royal visitation and residencia. Occasionally newly appointed viceroys were made visitors-general, and upon their arrival in the colonies traveled for thousands of miles to look into the conduct of officials, large and small; but usually special agents were sent to investigate governmental conditions, and often the same men provided for the special court of the residencia.

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[1] In writing of the investigation of his conduct in Mexico, Cortés told the king of the exhibition of the royal instructions, "which I and all those who assisted at the ceremony, held in our hands, took to our lips, and placed on our heads, as is customary in such cases, promising to obey and execute the prescriptions therein contained, as coming from our legitimate master and natural lord."—Hernan Cortés, "Fifth Letter," Hakluyt Society Publications (First Series), Vol. XL, p. 136.

The first serious royal overhauling in the Indies took place between 1543 and 1545, when Francisco Tello de Sandoval, a member of the council of the Indies, himself investigated the general administration of New Spain and particularly the conduct of the viceroy, Mendoza, with reference to the aborigines. As was customary, the official visitor secretly received complaints, which had been invited against Mendoza and others by posted notices; but in this instance the higher officials stood together, and the residencia ended without proving anything serious against the viceroy. Indeed, Sandoval departed leaving the impression that he had proceeded upon a very limited knowledge of colonial matters. This ignorance of conditions—an ignorance perhaps inevitable because of the extent of the colonies and their remoteness from the mother country—was a general weakness that tended greatly to discount the devices for maintaining good government, such as the residencia, which on the whole were effective in Spain. Professor Merriman has expressed the opinion that the residencia did more harm than good in the Indies; for it made conscientious officials fear to deviate from instructions (which frequently showed a lack of knowledge of the local situation) drawn up by the Council of the Indies, and it likewise tended to discourage initiative. On the other hand, dishonest persons, by means of bribery, sometimes escaped punishment for serious offenses, even after such had been revealed by the official investigations. Doubtless this thought was in the mind of the Peruvian viceroy who likened the residencia to the "whirlwinds which we are wont to see in the squares and streets, that serve only to raise the dust, chaff, and other refuse and set it on our heads"—a description unpleasantly suggestive of many investigations of political scandals in the United States.

In fact, corruption was a chronic disease in the Indies. It weakened the whole governmental machinery, particularly the part connected with commercial administration, and contributed greatly toward the downfall of the Spanish empire. It should be borne in mind, however, that official dishonesty was by no means peculiar to Spain's colonial servants of the time; in such matters standards and ideals have been raised in many countries during the past century. Moreover, Spain had a more colossal and difficult administrative task than imperial Rome, and, in view of the handicaps, the success attained was somewhat remarkable.

VI

SPAIN'S ECONOMIC ADMINISTRATION OF HER COLONIES

Learn, my son, with how little wisdom the world is governed.
Attributed to COUNT AXEL VON OXENSTIERNA

THE desire for financial gain was behind the introduction of the New World to the Old in 1492. Economic ambition played a major part in Columbus's desire to reach the Orient by sailing westward; and the hope for great riches from the undertaking was an important motive of even the pious Isabella in giving him needed aid. By agreement preceding the first voyage, all material profits coming from the venture were to be divided between the admiral and the Spanish sovereigns; but the exclusive rights promised the former were taken away by royal action very shortly after the dream of finding new lands was realized. Soon thereafter it became apparent that from an economic point of view the sovereigns looked upon the Indies as their *hacienda*, or private estate. At the end of Columbus's first voyage this royal hacienda consisted of but a few islands; in less than a hundred years it had spread over the West Indian archipelago and about a continent and a half of the mainland. Its owners aimed to make this vast estate pay, and pay well. Territorial concessions to private individuals were expected to bring golden returns to the royal coffers, and they frequently did. The annual income of the Spanish sovereigns from the Indies was enormous during much of the colonial period; but a large portion of it was squandered on foolish European wars.

For a time after Columbus's first two voyages the sovereigns were disappointed over the lands discovered in comparison with the expected riches and luxuries of the East. Hence they were so indifferent as to be liberal. By 1495 Castilians were granted the right to go rather freely to the Indies for trade or other purposes, merely being required to depart and return by the port of Cádiz and to give to the crown the use of one tenth of the space in their vessels and the same proportion of the profits made in the enterprise. During these early years no duty was charged on imports into Spain. Under these favorable terms voyaging to the Indies soon became so popular that Ferdinand and Isabella saw that they could secure larger profits for themselves without crushing the movement; therefore, beginning in 1501, royal licenses imposing various new restrictions were required of all who wished to sail to the New World. The policy of strict control of trade and travel between Spain and the Indies, thus begun, continued for nearly three centuries with little abatement.

At first Juan Rodríguez de Fonseca and his assistants had charge of all matters involving this control, as well as those concerning political administration of the Western territories; but in 1503 Ferdinand and Isabella created at Seville a special organization, called the Casa de Contratación, or House of Trade, already referred to, and gave it charge of all the commerce and navigation between the mother country and the Indies. The casa had the right to confer directly with the crown, though it was under the general jurisdiction of the Council of the Indies during most of its existence. Originally its staff included but three chief men—a treasurer, a business manager, and a *contador* (a combination of comptroller and secretary); but before the close of the sixteenth century it had become a large and complicated business organization headed by a very busy president. One of the earliest additions was a pilot-major, who had charge of maritime exploration, especially with a view to finding a western passage to the East Indies. Amerigo Vespucci was the first to fill the office. He was succeeded by Juan Díaz de Solís, who, it will be recalled, in his capacity of chief pilot discovered the mouth of the river Plata. From the royal pilotship grew a school similar to that established by Prince Henry of Portugal at Sagres a century before. It trained pilots and navigators, who must be examined by the pilot-major himself; and in it were made maps, charts, and nautical instruments. A chronicler, or historian, connected with the House of Trade kept as complete a record as possible of all political events in the Indies and also gathered scientific data of all sorts relating to them. Another important early appointee was the *correo mayor*, or postmaster-general, who had charge of all mails between the mother country and the colonies and between Seville (the casa headquarters) and the Spanish court. Late in the sixteenth century a purveyor-general was appointed to take over the work of men of lesser rank in the repairing, equipping, and provisioning of vessels sailing to the Indies.

Besides their various individual functions, the high officers of the casa had, collectively, legislative and judicial duties. They issued (subject to approval by the Council of the Indies) all ordinances concerning trade and related matters connected with the Indies, and they tried all cases resulting from violation of casa regulations, criminal cases concerned with misdeeds committed on voyages, and civil ones relating to royal revenue and to the breaking of the laws of trade for the colonies. Important cases might be appealed to the Council of the Indies. Toward the middle of the sixteenth century, civil suits between merchants were handed over to the *consulado* (consulate) of Seville, created in 1543. This was composed of a prior and two consuls, elected yearly by Sevillan merchants engaged in American trade, and worked in close coöperation with the casa. As time passed, the personnel of the consulado expanded, but its functions remained on the whole unchanged. Gradually consulates modeled after it, and likewise considered part of the casa, were established in Mexico City, Lima, and other important commercial centers in the Indies.

To enforce its economic regulations efficiently, the crown aimed to have but one port open to trade with the Indies. Seville, probably because of the superior influence of its merchants, was very soon selected as the commercial door to the New World. Through the great warehouse in that city (which gave the House of Trade its name) must pass all supplies for the Indies and all products from there. But the Cádiz merchants promptly protested against this regulation, and the commercial element of the colonies also resented it, for Cádiz had a much better harbor than Seville. In consequence of the opposition a limited right was given merchants to load and unload at Cádiz under supervision of a royal inspector. This did not prove satisfactory, and in 1535, after many changes, a branch commercial tribunal was created for Cádiz, to work under the casa at Seville. For a time, though clearance was given to vessels at Cádiz, they were required on returning from the Indies to go directly to San Lucar, the port of Seville at the shallow mouth of the Guadalquivir.[1] But it was impossible to enforce the regulations, and exceptions came to be made. Deep jealousy continued between the two cities; and in 1666, through the influence of Seville, the commercial tribunal at Cádiz was abolished and the port was entirely closed to trade with the Indies.

Soon, however, the tables were turned. As the result of a handsome gift to the yawning royal treasury the merchants of Cádiz got their tribunal restored in 1679, and promptly following this came the requirement that all vessels for the Indies depart from that port and return to it. On the whole this was a wise provision; for since water craft were being built larger and the mouth of the Guadalquivir was growing increasingly shallow because of the deposit of silt, it was a great hardship to the merchants of other ports to make the voyage of more than fifty miles up the river to register at Seville. The change struck a heavy blow at that city, however, and by the close of the century it was unable to supply the tonnage for the Indies to which existing regulations entitled it. Finally, in 1717 the casa itself was moved to Cádiz. The institution's powerful days were over, however; for Spain's trade was rapidly declining, and the more liberal policy later introduced by Charles III failed to revive it. Under Charles special secretaries took over some of the important tasks of the House of Trade, and in 1780 it was completely abolished.

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[1] Under Charles V about a dozen cities of Spain had for a time the same privilege, but little use seems to have been made of it.

The policy of closed ports in Spain was reflected in the Indies, where for about two centuries only three harbors on the mainland were open to direct trade with the mother country. These were Vera Cruz in Mexico, Cartagena in Colombia, and Nombre de Dios on the Isthmus of Panama, which was supplanted in 1584 by Porto Bello. Ports in the islands were open to certain vessels from Spain. For a short time, trade was permitted between various Pacific-coast ports and the Philippines, which belonged to Spain by virtue of Magellan's voyage and later arrangements with Portugal; but before the close of the sixteenth century Seville's jealousy had barred all of them to Oriental commerce except Acapulco, Mexico, which was permitted a very limited amount. Imports from the East must not, however, be sent to Peru even as gifts. Trade in native products between various parts of the Indies, especially New Spain and Peru, was likewise prohibited, and an effort was made to limit intercolonial trade in general. The cause for this was partly the greed and jealousy of Spanish producers and merchants and partly the same qualities in business men of the Indies. For instance, the ban on export of olive oil from Peru to Mexico was due to Spanish influence, but opposition to importation of Ecuadorean cacao into Guatemala was caused by the fact that it competed with the product of the latter.

Partly in the interest of enforcing the restricted-port policy, but more to protect the vessels from sea robbers, the casa in 1543 adopted the fleet system, which was officially in force most of the time for the next two hundred years. During much of the period sailings usually took place only once a year in either direction, but distinction was made between vessels bound for Vera Cruz and those going to Tierra Firma (Cartagena and Porto Bello). The fleet of the former, popularly called the *flota* (fleet), left for the Indies in the late spring; that of the latter, known as the *galeones*, sailed in the late summer. For a time all the vessels were expected to spend the winter in American waters and to start homeward in March. The voyage out, which was aided by the trade winds, usually took from two months to two and a half; the return required a little longer.

Each fleet had an armed convoy under command of an admiral and a vice admiral, and many of the merchant vessels—especially those bound for New Spain, which had less official protection than the others—carried a number of cannon and soldiers. The enormous amount of precious metals brought home from Peru caused the southern fleet to be escorted by an armada of from eight to sixteen men-of-war of the galleon type, from which the fleet got its name. The *capitana*, or flagship, commanded by the admiral, led the squadron, the *almiranta* of the vice admiral guarded the rear, and the remaining vessels of the armada were commonly arranged in crescent shape to the windward of the merchantmen, the quarter from which the enemy was most likely to appear. The rules required that all members of the fleet keep the flag of the capitana in view by day and the light of its lantern by night, and once each day an official count must be made of the vessels.

The size of the merchant fleets varied greatly. Clarence H. Haring states that toward the close of the sixteenth century the number of vessels ranged between thirty and ninety. During the next hundred years the size of the ships increased, but their number fell off out of proportion because of the economic decay of Spain. By the early part of the eighteenth century the merchant vessels had been reduced to a tiny fleet, and the schedule of sailings had become very irregular. In 1749 the fleet system was virtually given up, and register ships belonging to merchants of Cádiz or Seville largely took its place. These were swift vessels which had recently come into American commerce through being licensed by the Council of the Indies to carry supplies in the intervals between the irregular departures of the flota and the galeones. After 1749 the register ships were simply more numerous than before and sailed with greater frequency.

Promptly after the arrival of the fleets at their American destinations, lively fairs were held to exchange Old World produce for New. The market for the flota took place at Jalapa, in the mountains of Mexico, because of the unhealthful climate of Vera Cruz; but that for the galeones was held in the port of the Isthmus where the vessels anchored—first Nombre de Dios and later Porto Bello. Long preparation had to be made for these annual markets, especially for the southern one, which during much of the colonial era was the official market for most of Spanish South America. From Cartagena, the first port of call, word of the coming of the galeones was sent overland to Santa Fé de Bogotá and to Lima, whence it was relayed to more distant points; to the Isthmus message was sent by water, in order that the local merchants might get ready for the fair. On receiving the notice the viceroy of Peru ordered that the armada of the South Sea prepare to sail, and sent word throughout the realm for the forwarding of the treasure of precious metals due to the crown. Usually at the end of about two weeks all was ready, and the armada set out from Callao, port of Lima, bound for Panama, but stopped here and there at lesser ports to pick up outgoing stores of precious metals. Up the coast from farther south came various other products from Chile, and even some brought to the Pacific coast by caravan from Argentina, in merchantmen sometimes protected by the armada of the South Sea but often sailing alone.

During most of the colonial era merchandise was brought over the Isthmus from Panama to Porto Bello by two different routes. In the dry season caravans of pack mules carried the freight along a trail cut straight through the jungle and kept open by a small army of Negroes; but during the rainy period the merchants followed a longer route, partly by land and partly by the Chagres River, on which were employed flatboats manned by Negroes. In the eighteenth century a paved road that could be used the year round was built across the Isthmus.[1]

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[1] As early as the middle of the sixteenth century, suggestions were made for cutting a canal across the Isthmus. In 1550 a Portuguese navigator, Antonio Galvão, published a book in which he argued that any one of four routes—Tehuantepec, Nicaragua, Panama, or Darién—would be feasible; and the next year the Spaniard Francisco de Gomara, in his *History of the Indies*, mentioned the same routes and urged strongly that the Spanish crown undertake the construction of a canal. But the Spanish authorities received the proposal coldly. During the enlightened reign of Charles III, however, the Tehuantepec route was surveyed and found not to be practicable, and a survey of the Nicaragua route was ordered; but the wars which soon followed in Europe prevented anything further from being accomplished.

By the time the outgoing commodities had been gathered at Porto Bello, the galeones, which remained a week or more at Cartagena, had arrived; and trade began, swelling the population of the little town to relatively enormous proportions and hoisting the rent of the humble wooden dwellings and storehouses to fabulous sums. The import trade was usually handled by a small group of Spanish merchants, represented at the fairs by agents capable of exercising favorable influence upon the consuls in the Indies and thus of preserving a control that enabled them to make at times as much as five hundred per cent on their sales. Because of the bad climate the fair at Porto Bello was restricted to about forty or fifty days, but in the later colonial period trade had so dwindled that two or three weeks were quite adequate to complete the trafficking. There seems not to have been a time limit upon the fair held at Jalapa; but that was of less importance than the one on the Isthmus.

The cargoes brought to the Indies included in general what the colonies were not permitted to produce, or could not, especially manufactured goods, such as fine textiles, ready-made garments, shoes, hardware, machinery, wine, oil, quicksilver for use in the mines, and African slaves. In the early years there was also demand for live stock. On the return voyage the fleets carried mostly raw materials from the fields and ranges, forests and mines: maize, indigo, vanilla, cacao, sugar, coffee, tobacco, cotton, cochineal, hides, horsehair, tallow, live stock, leather, cabinet woods and dyewoods, salt, copper and tin, and, most important of all in government circles, the royal treasure in the shape of gold and silver, pearls, and emeralds and other precious stones.

The consignment for the crown was in the form of royalties from the mines and the pearl fisheries. Originally (as was customary in Spain) miners in the Indies were expected to give the sovereigns a two-thirds share of the yield, and royal officials were at hand to weigh the whole and receive the crown royalty. Very soon, however, it became apparent that such a high rate was not practicable for the New World, and it was rapidly lowered until the middle of the sixteenth century, when it was fixed at one fifth of the output (whence the term *quinto* to signify the royalty of the crown); and during the colonial period this remained the general ratio for pearls as well as for precious metals. However, because of local handicaps experienced by the miners in some places, the amount demanded by the crown was at times reduced to as little as one tenth or one twelfth of the yield;[1] but the annual income from the quinto was very considerable, and perhaps averaged something like two and a half million dollars.

At first the policy of the crown toward commerce, unlike that toward mining, was very liberal: except for a rather high duty upon imports into the New World, trade was practically free; but near the middle of the sixteenth century a change took place, and both export and import duties were laid in Spanish ports, and export duties were added on the American side. Since these were ad valorem, and the charge in the Indies was made on the current market value there, the amount that was paid by the colonists was excessive. Imports from Spain at times sold for several hundred per cent more than they would have brought in the home markets. Furthermore, they were taxed not only at the port of entrance from Spain but at other points, and this tax took into consideration the later increase in value. For example, at Callao an impost was charged on a commodity in consequence of its increase in price owing to the cost of transportation from Porto Bello.

More paralyzing to colonial commerce, perhaps, were the alcabala and the tolls charged in various parts of the Indies. The more remote the parts, the greater the burden. Toll walls existed between Buenos Aires and Callao, for instance; and the tariffs that settlers of the Plata basin were required to pay at Tucumán, Córdova, and other points on commodities passing north and south to and from Porto Bello were in general prohibitive to legal foreign commerce in the region. The fact that the alcabala was charged on the sale price made bad matters worse. On the other hand, colonial products far from the open ports brought so little in local markets as to make it impossible for most of the population to supply themselves even with necessary foreign commodities. Thus, when cattle in Chile sold for from one to two pesos a head, the price charged there for a bale of European paper was at least a hundred pesos, and for an imported coat or cape five hundred pesos or more. Such prices, says a Chilean historian, caused clothes to be handed down from generation to generation like landed estates.

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[1] A small royalty was charged upon the baser metals; but this was of little importance to the royal treasury, for the production of these was comparatively slight.

The high cost of imports was also partly the result of the crown's policy of granting the monopoly of trade in certain parts to privileged companies. This practice was especially followed in the early part of the eighteenth century. Thus, the monopolistic Honduras Company was founded in 1714, the Guipúzcoa (or Caracas) Company in 1728, the Havana Company in 1740, and the Santo Domingo Company in 1757.

Such, in general, was Spain's policy in the economic administration of the Indies. Obviously the most serious weakness was the heavy burden it laid upon the colonists,—a burden that in many parts strangled commercial activity instead of stimulating it. But trade and navigation between Spain and her American possessions had other enemies besides the unwisdom of these regulations; some of these were at home; others, abroad.

Among the latter were the pirates, who began to give trouble during the first half-century of Spanish control in the Western Hemisphere. At this time the French freebooters were especially numerous and daring: not only did they capture Spanish vessels at sea and in port, but they plundered coastal towns, robbing the churches and even the cemeteries, where they stripped the dead of their jewels. During the next half-century—the Elizabethan period of England—British pirates were unusually active and, encouraged by their doughty queen, surpassingly bold. Francis Drake was the first Englishman to pass through the Strait of Magellan into the Pacific, claimed by Spain under the treaty of Tordesillas as a *mare clausum*. In 1577 he not only performed this daring feat but proceeded up the coast, entering every port to plunder towns and loot vessels left unguarded by the unsuspecting Spaniards. Near Panama he captured a treasure ship from Peru, and, according to the report of one of his comrades, carried off "jewels and precious stones, thirteen chests full of reals of plate, fourscore pound weight of gold, and six-and-twenty ton of silver." But this was only one of many rich hauls made on the voyage. Fearful of returning the way he came lest he find the Spaniards awaiting him at the strait, Drake turned westward across the Pacific, capturing on the way a richly laden ship from the Philippines. In 1580 he reached home by way of the Cape of Good Hope, thus completing the second circumnavigation of the earth. Drake's audacious example in invading the "Spanish lake" was soon followed by Thomas Cavendish, who likewise carried off much treasure. Later came other pirates and privateers, among them the Dutchman Willem Schouten, who in 1616 discovered the passage round Cape Horn. By the middle of the eighteenth century the Pacific was a great open highway.

The seventeenth century was the golden age of freebooting at the expense of Spain. Formerly the pirates had made their headquarters in the Old World, Madagascar being a favorite haunt; but after Spain's weakness became apparent they settled down in the Western Hemisphere, helping themselves to territory belonging to the common enemy, especially to islands of the West Indies. With their bases so near their prey they could operate on a large scale. To French and British pirates were now added many Dutch. The West Indies were their favorite hunting ground, for it was easy to lurk unseen behind the islands and to pounce upon the Spanish vessels as they left the ports or passed through the narrow channels. One of the most spectacular feats of the pirates during this period was that of the Dutchman Piet Heyn, who in 1627 captured the silver fleet from Mexico with treasure selling for about sixteen million guilders.

In the second half of the century, after Cromwell's capture of Jamaica, the damage from the pirates increased, for many of the British freebooters made the island their rendezvous and were repeatedly aided and abetted by the local governor. Under the shadow of a commission from Governor Modyford of Jamaica, the notorious pirate Henry Morgan even crossed the Isthmus and captured and destroyed the prosperous city of

Panama. Between 1655 and 1671 (the date of Morgan's exploit), says Professor Haring, the pirates plundered "eighteen cities, four towns, and more than thirty-five villages." During the three centuries of Spanish rule over the Indies the losses due to freebooting activities reached a total that though incalculable was certainly colossal, and they unquestionably played an important part in Spain's economic decline.

Much more serious was the demoralization and final breaking down of the commercial system itself. Even at the very beginning of trade with the Indies, merchants commonly practiced fraud. At times they smuggled unregistered goods aboard ships; but it was usually easier and safer to bribe the captains to violate their bond not to carry such merchandise and to bribe port officials, who were proverbially dishonest, to pass commodities through customhouses untaxed. It is probable that more than half the goods carried by Spanish vessels were unloaded without payment of duty, with proportional loss to the crown.

Still more fatal was the contraband trade carried on by foreigners. Some of it was done without the knowledge of Spanish officials, by landing merchandise in small boats on lonely parts of the coast, but near fair-sized towns, and making secret connections with local merchants. At times illegal traders operated in open defiance of port authorities, as in the case of Captain John Hawkins, who, protected by the cannon of his vessel, landed two hundred Negro slaves in Santo Domingo under the eyes of the helpless local officials and sold them at bargain rates to the willing islanders; but most of the contraband traffic with foreigners was probably made possible by the sheer indifference of the Spanish authorities or their active collusion in return for bribes. It should be stated, however, that resistance on the part of the officials would in many cases have been futile; for at no time were the Indies adequately protected by the mother country, and after the defeat of the Spanish Armada sent against England in 1588 the naval patrols for the American colonies were farcically small. Furthermore, owing to the neglect of agriculture and industry in Spain, that country did not produce enough during the latter part of the colonial period to supply the needs of the colonies. This fact led to a marked expansion of foreign trade with the Indies, illegal as well as legal.

Before the middle of Charles V's reign the illegal foreign trade had been launched—to a considerable extent by pirates, who secured their merchandise by plundering ships. Perhaps no part of the whole Atlantic coast of the Spanish Indies was left unvisited by contraband traders; but each nationality tended to favor some regions above the rest. The Portuguese of southern Brazil reaped rich returns by supplying the bottled-up settlers of the Plata basin with needed commodities at comparatively reasonable rates and relieving them of products which they could not profitably send overland to Peru. As an aid to this illicit trade the Portuguese authorities built Colonia del Sacramento on the left bank of the Plata. The Dutch were particularly active on the Venezuelan coast, where they also built a settlement (though the neighboring island of Curaçao was their favorite base), and practically monopolized the commerce of the region until after the Spanish government had created the Guipúzcoa (or Caracas) Company in 1728 and set it up as a competitor by the grant of special privileges. Though the British shared in the contraband trade of the Plata and of other parts, they established themselves definitely in Central America, where they created a commercial "underground railroad" by means of the Mosquito Indians, whom the British government declared to be under its protection as a sovereign nation quite independent of Spain. On the neighboring coast of Yucatán, at Belize, the piratical British settled and exploited the logwood in defiance of Spain. In 1763 their government secured protection for them there through a log-cutting concession. The French were particularly active in the West Indies, where they occupied the western part of Hispaniola, as well as many of the small islands. But they long enjoyed special privileges in all parts; for Louis XIV, whose aggressiveness waxed as Spain's powers waned, demanded of the inefficient later Hapsburg kings of Spain that his subjects be unmolested in their illicit trading, and threatened more than once to set the French West Indian pirates upon the Spanish colonies if his wishes were ignored.

After the War of the Spanish Succession, however, it was England that had special advantages in connection with the contraband trade in the Indies. These came from the commercial *asiento* of the Treaty of Utrecht (1713), which ended the war. By this contract England secured from Spain the right (recently enjoyed by a French company) to supply the Indies with African slaves.[1] It was agreed that during the next thirty years British traders might import into the Spanish colonies a total of one hundred and forty-four thousand Negroes, to be paid for in cash or in goods. The asiento also stipulated that British merchants should have the right to send annually to the Indies a ship of five hundred tons' burden loaded with English goods to be disposed of at the fairs held in Porto Bello and Jalapa. In order to care for this trade the British were authorized to station factors at ports in the Indies, but in no place were these to exceed four in number.

All the commercial privileges secured by the British government through the asiento were transferred by it to the South Sea Company. This contained many unscrupulous Englishmen who, in the opinion of one of its factors, recognized getting caught as the only sin. The members of the company resorted freely to bribery of the Spaniards and others, and in many ways exceeded the terms of the contract. The most common and most advantageous violations were in connection with the annual permission ship; for after its original cargo was unloaded the vessel was made a bridge over which were carried into Spanish ports many shiploads of goods supplied at night by tenders from British vessels which kept concealed during the day. In consequence of such gross frauds the South Sea Company made great profits, and this led many English private individuals to imitate its methods. The Spanish government, somewhat reënergized by the accession of the Bourbon house to the throne in 1700, tried to meet the situation by strengthening the naval coast guard of the Indies, and even permitted a limited degree of privateering. The resulting conflicts between Spaniards and

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[1] Practically from the beginning the Spanish crown had sold to various groups of foreign merchants in turn the monopoly of the African slave trade with the Indies.

English led in 1739 to what came to be called the War of Jenkins's Ear, which merged into the War of the Austrian Succession. In 1750, two years after the close of this struggle, England, in return for a hundred thousand pounds, gave up whatever special commercial rights remained to her in the Indies. This ended the activities of the South Sea Company in the Spanish colonies, but it did not eliminate the contraband trade to which the company's methods had given new momentum.

The situation became worse after the Seven Years' War had given to Spain, through its acquisition of Louisiana by the treaty of 1763, a long frontier bordering on English territory. The enlightened Charles III tried to save the situation by working for the revival of Spanish agriculture, industry, and commerce, and by opening numerous ports in Spain and the Indies to direct transatlantic trade.[1] But his efforts were largely in vain, and matters grew worse under his son, Charles IV. National production did not meet colonial needs, and the colonists were far too demoralized by the long period of illicit trade for any reform to be possible. Indeed, during the last half-century of Spain's colonial régime not only was she confronted by a growing army of smugglers, but in order to enable Louisiana to secure desired commodities she was forced to grant liberal trading terms to British and to Americans from the United States, both of whom could easily undersell the Spaniards who were still in the commercial field.

Thus, despite Spain's three centuries of costly effort to operate the Indies as a commercial monopoly, the vast region had become increasingly riddled with contraband trade or else been made financially unprofitable to nationals through commercial concessions to foreigners. Probably during most of the colonial era the value of the smuggling activities was many times greater than that of the legitimate commerce; and by the end of that time Spain was economically so decadent and so generally demoralized that her colonial subjects were quite disillusioned regarding her glories and her status among the nations.

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[1] Eight ports besides Cádiz were opened in Spain, and those of La Plata, Chile, and Peru in the Indies. Besides, intercolonial trade was now permitted.

VII

THE CHURCH IN THE SPANISH INDIES

"Orthodoxy, my Lord," said Bishop Warburton in a whisper,—"orthodoxy is my doxy; heterodoxy is another man's doxy."

JOSEPH PRIESTLEY, *Memoirs*, Vol. I, p. 572

SINCE Isabella had a strong missionary motive in aiding Columbus, it was to be expected that the Roman Church would play a conspicuously important part in the Indies; and such was the case. But its part was played under royal direction; for the Church became the strong right arm of the crown in the Indies, and its most important instrument of control. The dominant position of the State was secured early through timely petitions to the Holy See. In 1501 Pope Alexander VI conceded to Ferdinand and Isabella the right to collect tithes in the newly discovered territories, these to be used for the support of the faith there and its spread among the aborigines. Within the next few years came other concessions. The income from annates and indulgences was to be in charge of the crown, which was likewise authorized to organize the Church in the New World, to make all ecclesiastical appointments, and to supervise the activities of the clergy both secular and regular. Without royal consent no churchman of any sort might enter the Indies and no papal bull be introduced. The degree of control enjoyed by the Spanish government over the Church in the Indies was probably unparalleled elsewhere during the period.

The willingness of the Pope to make such concessions had various causes: the fact that supremacy was granted before it was dreamed how vast would be Spain's New World dominions; the almost immediate outbreak of the Protestant revolt, which absorbed the most serious attention of the Popes during a large part of the sixteenth century; the piety of the early sovereigns, especially Isabella, which gained the confidence of the ecclesiastical head at Rome; and the fact that the Spanish rulers in the main seemed true to the trust placed in them as far as circumstances permitted.

At first the Spanish crown controlled the Church in America directly through the Council of the Indies and its official antecedents. But in 1600 the *Cámara de Indias*, modeled after the recently created *Cámara de Castilla*, was organized as an adjunct to the council, and to it was given the right to make final decision on questions connected with ecclesiastical appointments and, in general, to regulate all matters pertaining to the clergy and their activities. Bishops and archbishops were commonly named to office directly by the crown and the council or cámara, and inferior clerical positions were usually filled by these higher Church officers with the approval of the viceroy or the captain-general or other head of the province, or by the latter functionaries from a list submitted by the bishop. Between the prelates and the chief lay authorities jealousy often existed, producing friction, which in the seventeenth century became more common because now the bishop rather than the audiencia filled temporary vacancies in the office of viceroy. This lack of harmony between the two classes of officers was, as has been stated, quite in line with the crown policy of "divide and rule"; and the royal ear was always open to complaints from the one against the other.

Though otherwise much restricted by the civil power, the Church in the Indies, as in Spain, was permitted to have its own courts. These, made up entirely of churchmen and presided over by a bishop, tried by canon law all cases dealing with spiritual matters or with the clergy.

Every twelve years, and oftener if deemed necessary, Church councils could be held in the Indies, but only with the consent of the sovereign or his local representative; and the viceroy was expected to attend the gathering as spokesman of the sovereign. Sometimes the judges of the audiencia also were present, but only the bishops had an authoritative vote. After being approved by the Council of the Indies, the decisions of these councils were sent to the Pope and were permitted to be put into effect. The first Church council in the colonies met in Mexico in 1555, with the aim of devising better ways and means of converting and protecting the aborigines and of improving the quality and organization of the clergy. Other similar ecclesiastical gatherings were devoted primarily to introducing into the Indies the reforms decreed by the Council of Trent.

It was the aim of the crown to establish and maintain an orthodox church in the colonies, and especially to insure the Christianized aborigines against heretical contamination. With this in view the Casa de Contratación aimed to admit to the Indies only those whose personal theology and religious antecedents were beyond question. Still, many undesirables from the standpoint of the Church succeeded in reaching there even at an early date. For a time they were dealt with by inquisitorial agents (ordinarily Dominicans sent over from Spain), but in 1569 the crown decreed the establishment of separate tribunals of the Inquisition in the colonies. The first inquisitorial court of the Indies was set up in Lima in 1570; and in the following year one was installed in Mexico City also. Subsequently similar tribunals appeared in other parts.

The heretics occupying most of the attention of the colonial inquisitors were Protestant interlopers, especially English and Dutch engaged in contraband trade, and Portuguese Jews who went into the Spanish colonies from Brazil in large numbers during the sixty years of Portugal's captivity. "Because of their ignorance and their weak minds," the Christianized aborigines who fell away from the faith were not commonly regarded as heretics, but as children to be led back to the right path and kept there by comparatively mild methods. But the ferreting out and punishing of heresy was not the only function of the Inquisition in the Indies: it also investigated and penalized, directly or indirectly, cases of witchcraft, bigamy, perjury, blasphemy, and other related offenses, especially those coming under the jurisdiction of the Church, and censored all publications arriving in the colonies or printed there.

The punishments meted out by the Inquisition included flogging, imprisonment, work in the galleys, banishment, and death; and usually all sentences were accompanied with the confiscation of property. The most hardened heretics were burned at the stake; but in the Indies, as compared with Spain, such executions were rare, only forty-one being reported for Mexico and fifty-nine for Peru during the colonial period.

The conversion of the Indies and their ecclesiastical organization began with a promptness worthy of the energetic Catholic kings. Twelve friars accompanied Columbus on his second voyage and began missionary work among the aborigines. Other members of the clergy, secular and regular, soon followed in considerable numbers. In 1511 Hispaniola was organized into two bishoprics. Toward the middle of the century the first archbishoprics—Santo Domingo, Mexico, and Lima—were created; by the close of the colonial era four others—Guatemala, Santa Fé de Bogotá, Caracas, and Charcas—had been added, largely at the territorial expense of the first three. These seven archbishoprics were finally divided into about thirty-five dioceses.

The lower clergy were grouped into three classes according to the character of their duties: *rectores*, or parish priests, stationed in the cities and towns to minister to the Spanish inhabitants; *doctrineros*, or catechists, who labored in the villages of more or less converted Indians; and *misioneros*, those sent out to the remoter parts to tame and evangelize groups of aborigines not before brought under the influence of the Church. The first of these positions was the best and could be held only by secular clergy; the other two were commonly occupied by members of the religious orders, usually Franciscans, Dominicans, Augustinians, or Jesuits, who were not qualified as priests.

In its early work among the American aborigines the Roman Church showed great shrewdness and adaptability as well as devotion. At the outset it was assumed in some parts that the natives had once possessed the true faith but had been led astray by Satan—a view perhaps honestly held by many Christian priests, for it seemed to be supported by various striking parallels between the religious teachings, practices, and organization of the most advanced native groups and those of the Roman Catholic Church. The object of the missionaries was therefore to restore the aborigines to their former fold; hence the mission stations were often called *reducciones*, places where the natives were to be "reduced," or led back, to the supposed religion of their ancestors. In many cases conversion merely meant the acceptance of certain substitutions. The images of the gods of the Aztecs and Incas were replaced by representations of Jesus of Nazareth, the Madonna, and the Christian saints. For their sacrifices, human and otherwise, the aborigines received the Mass. The pious but astute Hernando Cortés even caused the figure of the dove, symbolic of the Holy Ghost, to occupy in the minds of the simple Mexican natives the place of the eagle on their ancient coat of arms. Millions of the most advanced aborigines were, of course, familiar with the monastic idea, confession, prayer, penance, belief in miracles, the use of incense, and the custom of religious processions.

Very early the clergy learned to accelerate their work by making appeal to the racial consciousness of the aborigines. The most successful instance of this was the development of the legend of the Virgin of Guadalupe. The story goes that in 1531, on a rocky hillock near Mexico City, the Madonna appeared as an Indian maiden to a humble native named Juan Diego and asked that a temple be built on the spot in her honor. Juan Diego reported the great event to the bishop, Fray Juan Zumárraga, who was unbelieving and demanded a miraculous sign. The Indian returned to the hill and, under the instructions of the Virgin, who again appeared, gathered in the skirt of his mantle roses from bushes found miraculously blooming on the summit of the hillock. He brought these to the bishop, and when he opened up his mantle to present them, upon the coarse cloth was revealed a painted likeness of the Virgin. The picture was preserved as a most holy relic in a church built the next year on the spot where the miraculous happenings took place (now known as Guadalupe Hidalgo). The report of the miracle had a profound effect upon the work of the missionaries in Mexico. The aborigines went almost wild with religious joy, showed an unwonted eagerness to give up their old idols, and accepted as their patron saint, almost as their deity, the Virgin of Guadalupe, to whose shrine multitudes made yearly pilgrimages.[1]

Soon other parts of Mexico were favored with visits of the Madonna, and the result was the creation of new shrines and a great increase in conversions in those sections.

In the Spanish colonies outside of Mexico, miracles likewise helped to popularize the new religion, as did the canonization in the seventeenth century of Rosa of Lima, a pious woman, partly Indian in blood, who in 1668 was proclaimed by Pope Clement IX as the patron saint of the whole of the Indies.

In the early years of the Spanish rule, soldiers and priests occasionally coöperated in making "conversions," really achieved by military coercion. Such accessions to the Church were known as *entradas* (entries) or *conquistas de almas* (conquests of souls). One of the largest of such conquests, in which there were thirty-two thousand baptisms, resulted, it will be recalled, from Gil González's first expedition into Central America. As a rule, however, the missionaries won the aborigines for the Church by gentler methods, such as vivid representations of the bliss of heaven and the tortures of hell.

The most difficult as well as the most romantic religious work was that among the wildest natives, found usually in the isolated parts of the Indies, especially on the northern and southern frontiers and in the wilderness of the interior. The missionaries in charge (usually Franciscans or Jesuits), in addition to their religious duties, did much work as explorers and soldiers, expanding and defending the frontiers of the realm. The Franciscan order, three centuries old when Columbus discovered America, early began work along the remoter borders, establishing themselves upon the northeastern part of the Mexican plateau in the latter half of the sixteenth century and gradually extending their labors until they had missions scattered here and there from New Mexico to Florida. The Jesuits, whose order came into existence after the work of the Franciscans had been well launched in the New World, showed more energy than the latter, and after a time had charge of a much larger mission area than they. Before the close of the sixteen hundreds they had a strong hold in the northwestern part of what is now the Mexican Republic, whence they spread northward. A century later, under Eusibio Kino's energetic leadership, they were established well within the territory of the present Arizona. Meanwhile another Jesuit leader, Juan María Salvatierra, dotted the half-barren peninsula of Lower California with mission stations, and maintained them there with the aid of food supplies in the form of cattle sent by Father Kino.

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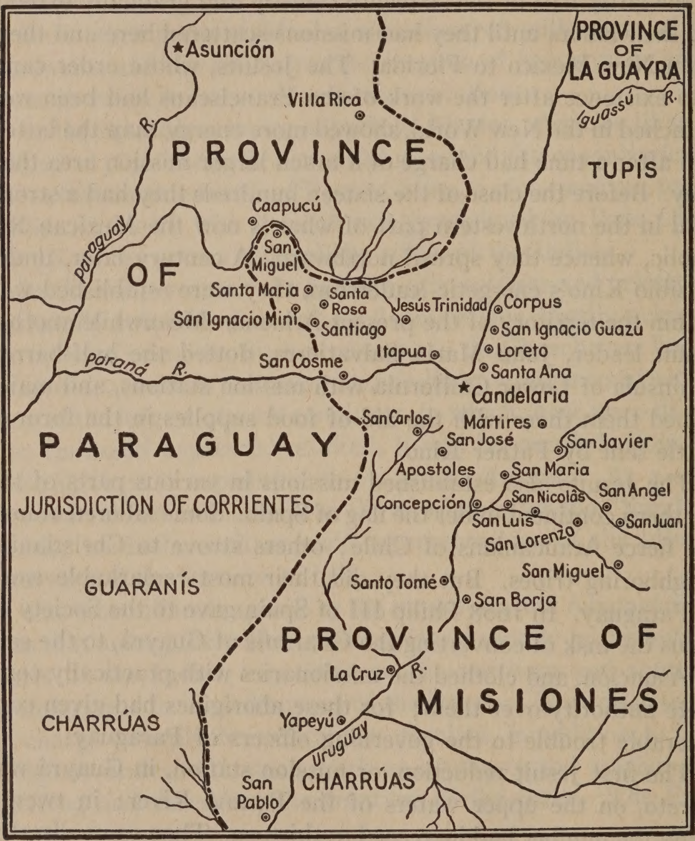
[1] The legend of the miraculous appearance of the Virgin at Guadalupe has been the subject of considerable discussion among intelligent Mexicans, and of some careful investigation; for doubts as to the truth of the story seem to have arisen very early. Perhaps the best study on the subject is that made "solely from an historical aspect" by the distinguished Mexican historian Joaquín García Icazbalceta and reported in October, 1883, to the archbishop of Mexico. Señor Icazbalceta's conclusion was that the reported apparition of the Virgin had no foundation in fact. See Joaquín García Icazbalceta, *Carta acerca del Origen de la Imagen de Nuestra Señora de Guadalupe de Mexico al illmo. Sr. Arzobispo D. Pelagio Antonio de Labastida y Dávalos* (Mexico, 1896).

The Jesuits also established missions in various parts of the southern continent under the flag of Spain. Some labored among the fierce Araucanians of Chile; others strove to Christianize neighboring tribes. But they did their most remarkable work in Paraguay. In 1608 Philip III of Spain gave to the Society of Jesus the task of converting the Guaranís of Guayrá, to the east of Asunción, and clothed the missionaries with practically complete authority over them; for these aborigines had given considerable trouble to the governing officers of Paraguay.

The first Jesuit reduction, or mission station, in Guayrá was Loreto, on the upper waters of the Paraná River; in twenty years the number had increased to thirteen. Then came disaster in the form of slave-hunters from southern Brazil, who burned the mission stations and murdered or carried off large numbers of the Indians. Consequently the Jesuits moved with their remaining charges down the river to the south of the Iguassú Falls, and here maintained themselves against all enemies by arming and drilling the aborigines. The capital of these later reductions was Candelaria, which was the center of a large area, for the mission stations spread far, especially to the south and east, and finally occupied the banks of the Uruguay River. In their new territory the missionaries gained much material prosperity, through


Asunción
Villa Rica
PROVINCE OF LA GUAYRA
Iguassú R.
PROVINCE
TUPÍS
Paraguay R.
Caapucú
San Miguel
OF
Santa Maria
Santa Rosa
Jesús Trinidad
Corpus
San Ignacio Miní
Santiago
San Ignacio Guazú
Loreto
Itapua
Santa Ana
Paraná R.
San Cosme
Candelaria
San Carlos
Mártires
PARAGUAY
San José
San Javier
Apostoles
San Maria
JURISDICTION OF CORRIENTES
Concepción
San Nicolás
San Angel
San Luis
San Juan
San Lorenzo
GUARANÍS
Santo Tomé
San Miguel
San Borja
PROVINCE OF
La Cruz
R.
MISIONES
CHARRÚAS
Yapeyú
Uruguay
San Pablo
CHARRÚAS

JESUIT MISSIONS IN THE NORTH PLATA BASIN

Adapted from map in Antonio Tavarozzi's *Historia de la Patria*

carrying on a flourishing trade with the provinces farther south, to the great indignation of the Spaniards in the lay section of Paraguay, which retained its capital at Asunción. But after about a century the Jesuit missions of this fertile region suffered a hard blow through the war of the Seven Reductions,[1]—a blow from which they never recovered,—and in 1767 by order of Charles III the Jesuits were expelled from all Spanish territory.[2]

The work which they were compelled to drop was assumed by the Franciscans and Dominicans, particularly the former, who took charge of the Paraguayan reductions; but they failed to show the same ability in handling the Guaranís as the Jesuits had done, and the missions remained in a state of decline. The Franciscans also fell heirs to much of the Jesuit work in northern Mexico, notably that launched by Father Salvatierra in Lower California; and under the new management there took place the proselyting invasion of Upper California led by Miguel José Serra—better known as Junipero Serra. Under this devoted and indefatigable friar San Diego Mission was established in 1769. This formed the first link in a chain of twenty-one missions, the last of which, Sonoma, north of San Francisco, was founded in 1823.

The money needed for starting missionary enterprises came to some extent from pious private individuals, but the bulk of the necessary funds was supplied by the royal treasury. Once established, however, the missions were usually self-supporting. Though in Paraguay and also in Lower California the Jesuits provided their own armies of defense, the Spanish government frequently established small permanent military stations, called *presidios*, in connection with the missions. This was especially done on the northern frontier, where the need for such protection was soon realized because of revolts of the mission Indians and attacks from neighboring tribes. In numerous cases these religious establishments became the nuclei of cities now existing in various parts of the New World.

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[1] In 1750, with the purpose of a permanent settlement of the boundary, Portugal and Spain made a "treaty of exchanges" whereby the former should surrender Colonia on the Plata to Spain in return for the seven Guaraní reductions on the left bank of the Uruguay. The Indians, incited by the Jesuits, revolted against the transfer; they were crushed after bitter fighting, but the treaty of 1750 was annulled.

[2] There was rather general resentment against the Jesuits because of their extensive commercial activities. Moreover, they tended to defy lay authority. The sovereigns of both Spain and Portugal were indignant over the disloyal influence exercised by them upon the Guaranís of the Seven Reductions (see preceding note). In Portugal members of the society were suspected of part in a plot against the life of King José I, and in Spain there was reason to believe that they were secretly combating Charles III's reforms. The king of Portugal issued a decree for their expulsion from his dominions in 1759, eight years before similar action was taken by Charles III. Partly as a result of royal pressure from different quarters, Pope Clement XIV in 1773 issued a bull suppressing the order; it was fully restored by papal action in 1814.

The number of aborigines connected with the missions varied greatly: in some there were not more than two or three hundred; in others (notably the Paraguayan reductions) there were gathered as many as fifteen or twenty thousand persons. Though the Jesuits pursued an isolationist policy for their charges, and this was less characteristic of other orders, the mission stations as a whole were constructed and administered along the same general lines. The main buildings, grouped around an open square, included a church, a school, a residence for the missionaries, and often an inn for travelers; and beyond these were the huts of the natives, bordering upon streets which ran at right angles from the square. The more important structures were of stone or adobe; those housing the natives were of adobe or more perishable materials. Stretching away from the buildings were the mission lands, often containing many thousands of acres; and sometimes beyond these lands were additional haciendas, or farms, leased to the main mission, each having its chapel.

The Indians were completely under the control of their religious preceptors; under their direction they worked the lands, tended the flocks and herds which wandered over the vast estates, and followed various useful trades and crafts learned from their guardians. Often their labors resulted in a surplus,—of live stock, wool, hides, tallow, sugar, indigo, cotton, maté, furniture, pottery, candles, soap, or textiles, according to the location of the mission,—and the Jesuits usually disposed of this at a fair profit. Of the Franciscans in California a historian has stated that their theory was "to make the savages work out their own salvation and that of the priests also"; but this is hardly fair to the missionaries in question or to those elsewhere —though certainly the mission Indians held no sinecures. Although they did all the heavy work on the communal lands of the missions, they usually had small plots for their own support, which they were given free time to work. Furthermore, their guardians managed the whole system whereby, in return for their labors, the natives were provided with shelter, food, and clothing; and, what was of supreme importance in the minds of the most devoted missionaries, they were given the chance to save their souls for the eternal bliss of paradise—an immeasurably great value in return for the mere pittance of manual labor. Everything considered, the clergy were decidedly the best friends the aborigines had under the Spanish colonial régime.

The religious instruction given to the Indians was simple, especially at the missions. Prayers, the catechism, the creed, and songs were taught by rote, generally in Spanish by most of the orders; but the Jesuits, in harmony with their policy to keep their charges isolated from European contacts, learned the native tongues and used these as mediums of communication and instruction. Very little was done, especially in the early period, to give the wild Indians a knowledge of reading and writing. The supervision at the mission stations was as strict as in a boarding school, and the aborigines were punished for their offenses like children, usually by whipping or by being required to do some sort of penance.

As a result of missionary efforts most of the aborigines of the Spanish Indies were given at least a thin veneer of European culture during the colonial period. Most of them were likewise incorporated into the Roman Church; but perhaps the majority of these remained pagan at heart or, what was worse, lost the ethical standards of the old order without grasping the principles of life taught by the founder of the new religion. There were various reasons for this state of affairs. (1) The Christianization and civilization of several millions of culturally backward pagan peoples was in itself a colossal undertaking. (2) The very size of the task apparently tempted the clergy in many cases to work for numbers of converts rather than for high

Christian ideals among those brought into the fold. As has been indicated, the various parallels between the religious forms and practices of the most advanced aborigines and those of the Roman Church encouraged this large-scale proselyting. (3) It must be added in this connection that the conduct of a large proportion of the Spanish conquerors perhaps did less than nothing toward making the spirit and ethical principles of Jesus of Nazareth a living force in the minds of the aborigines. (4) What was more serious was the fact that even at the outset the conduct of the clergy (especially that of members of the monastic orders, who came from many countries) often left considerable to be desired; for Spanish dominion in the New World began on the eve of the Protestant Reformation, when the Church contained many evils later acknowledged by it through the reforms decreed by the Council of Trent. And, partly because of the ecclesiastical control in the Indies delegated by the Pope to the Spanish sovereigns, these reforms were not as thoroughly introduced into that region as they were in Europe. This was not from lack of a desire on the part of the crown to bring about and maintain high standards, but because in the colonies it was even more difficult to enforce the royal will in religious matters than in civil concerns. (5) As time passed, the demoralizing effect of tropical climate, the temptations offered by the primitive environment, and their great isolation from the ecclesiastical headquarters in Europe caused the clergy of the Indies steadily to degenerate. By the close of the colonial period they were as a whole far behind their fellows in Europe and the United States in character and spiritual ideals, and they had revived in the New World some of the conditions which had hampered medieval Christianity.

The Church offered an attractive career, especially in the early pioneering period of the colonial era, because in the more settled communities it made possible a life of comparative ease. Hence a large proportion of those who adopted clerical careers did so not from a desire to serve mankind but in order to secure an easy living. Despite governmental attempts at regulation and restriction, there were a very great number of clergy in comparison to the remainder of the population. For the most part they were gathered in the cities, where the monastic orders had many houses. In a letter written to the viceroy of Peru in 1620 Philip III stated that the convents in Lima covered more ground than all the rest of the city. Twenty years before at least four hundred convents were reported to exist in New Spain alone, and by 1644 the members of the monastic orders had become such a problem in the capital that the authorities petitioned the king to have no new monasteries founded there and to limit the revenues of existing ones, as otherwise the religious houses would soon own all the property of the country. That the oversupply was not limited to regular clergy was evident from the fact that the same petition asked that the bishops be restricted in the number of candidates they ordained, since there were at the time more than six thousand clergy in New Spain who were without charges. Even at the close of the eighteenth century, when the zeal for clerical careers had somewhat abated, the number of clergy continued excessive, as is apparent from the fact that there were something like fifteen thousand in New Spain and more than three thousand five hundred in the sparsely settled region now included in Colombia, Venezuela, and Ecuador.

The fears of the authorities of Mexico City regarding the growth of the Church in wealth were well founded, for it was the constantly increasing riches of the institution that made it possible for a large fraction of the clergy to live in idleness. The untaxed landed estates to a considerable extent accounted for the great fortunes possessed by the monastic houses; but these houses as well as the secular churches added much to their wealth by the gifts of the superstitious and the pious. It was a rare exception when the will of a wealthy person (and many were wealthy in Mexico and Peru) failed to make a bequest to the Church, and often people gave very generously of their wealth long before death overtook them. The income from tithes and from fees (at times excessive) for religious services also formed a very large total. What the Church received, it kept; by the close of the colonial era probably half the land in the Indies that had passed into private hands was owned and controlled by it, and in hundreds of parish and convent churches and cathedrals were decorations, images, and utensils of gold and silver representing great value, which had been gradually amassed, partly through heavy exactions upon the poor and ignorant.

Obviously there were many exceptions to what has been said of the remissness of the churchmen. Despite the resentment felt toward the commercial activities of the Jesuits, they generally escaped criticism in other regards, for the strict discipline of the society made idleness and viciousness in its members much more difficult than in the other religious orders. Furthermore, the ideals and character of the higher secular clergy, practically all of whom came from Spain, were generally much superior to those of the parish priests, though in both classes there were men who lived exemplary lives and showed a fine devotion to duty.

All things considered, the religious influence of the Roman Church was probably beneficial; for though to a considerable extent the contact of the missionaries and other Christians with the aborigines resulted in a lowering of the ethical standards of the latter, it should not be forgotten that this contact was responsible for doing away with some of the cruelties peculiar to paganism, including human sacrifice with its attendant cannibalism, so general in Mexico. The Church probably also inspired the natives with deeper feelings of tenderness and pity for mankind, though this had the undesirable result of encouraging the indiscriminate giving of alms as an act of piety. But this unwise giving of alms was general in Christendom at the time and was a very minor matter in view of the fact that in Latin America, as elsewhere, the Church bore practically the whole responsibility for humanitarian work. In so far as the needs of the orphaned and homeless, the sick, the outcast, and the generally wretched members of society in the Indies were systematically cared for, that care came from the Roman Church.

Mention has already been made of the important service rendered by the clergy in the political administration of the Spanish colonies. Their work as educators and scholars will be taken up in a later chapter.

VIII

ECONOMIC ACTIVITIES IN THE SPANISH COLONIES

If you would know the value of money, go and try to borrow some.
BENJAMIN FRANKLIN, *Poor Richard's Almanac*

DESPITE the unwise restrictions placed by the crown upon colonial economic pursuits, there was a great deal of getting and spending in the Indies. Even the humblest usually managed to eke out some sort of existence, generally through direct service to others; a considerable portion of the population had a fair competence; and a small number amassed great fortunes.

Before considering the various gainful uses to which the colonists put the soil of the Indies, it is important to note some of the chief regulations for the distribution and exploitation of the land. The fact that the New World was looked upon as the private estate of the sovereign prevented any recognition of right of occupancy by the Indians, such as existed in the English colonies and later in the United States. All land was subject to distribution by the Spanish ruler for use in perpetuity, and in such distribution the whites were chiefly considered; but the sovereign intended that every village of aborigines be left with sufficient soil for their support.

It was by no means unusual for the crown to sell tracts of land outright to individuals; but perhaps most of the territory in private control at the close of the colonial period got there through royal grants made on the profit-sharing basis or without direct material return to the crown, in the interest of encouraging and promoting the settlement and development of the Indies.

The free distribution of soil in the interest of stimulating settlement began very early. In 1513 the crown decreed that lands should be allotted in tracts of two general sizes: the *peonía* and the *caballería*. The first, containing about a hundred acres, was considered sufficient to support a single family of humble status; the second, about five times as large, was for men "of higher rank and more deserving." Full title was granted after four years of occupation and improvement of the soil. This law of 1513 was the basis of an important colonization ordinance passed sixty years later which was almost identical with it. The distribution of the two kinds of allotments commonly took place when towns were laid out by conquistadores or other founders of settlements, who usually were permitted to keep about a fourth of the whole for themselves. In addition to the lands parceled out to individuals, a tract of community land for grazing and similar purposes was set aside to be administered by the municipal council.

The fact that land was abundant and cheap often led to various complications and irregularities. Conflicting grants were very common. Squatters helped themselves to soil that appeared to have no owners; and cattlemen, regardless of title, ranged their herds wherever the grazing was good, a practice that resulted in many a quarrel ending in bloody fray.

According to an old Spanish law ownership of the surface land did not carry with it right to the subsoil. In the minerals found in the subsoil, particularly the precious metals, the greatest interest of the crown was centered, for these were a very special *herencia real* (royal inheritance); but since gold and silver lying buried in the earth were of no aid to greedy monarchs with ambitious military plans, the Spanish rulers offered many inducements to their subjects to find the treasure and make it available. Hence, the mining class was favored above all others in the colonies after the first experimental years. A fifth of the output of the mines, as has been stated, was the usual rental required by the sovereign, a rate which, even if paid in full (as perhaps rarely happened), would have been generous to the mine-operators. In addition, various exceptions were made in favor of the mining element in the application of the general laws. Thus, the miners might not be subjected to usury; neither could their tools be seized for debt. More advantageous than such concessions, however, was the modified type of the Spanish encomienda system which was early developed in the mining sections. By this system individuals were granted villages of Indians who could be used for work in the mines.

Mining was the first honest economic activity engaged in by the Spaniards in the New World. Even before they had stripped the natives of Hispaniola of their valuables, individuals among the invaders were taking gold from the soil in various parts of the island. With the conquest of the mainland new and richer deposits were found here and there almost throughout the length of the Cordilleran system, but the mines of Mexico, New Granada, and Lower Peru were notably abundant in their yield. Great quantities of silver also were dug out of the mountains, in the same general regions as those abounding in gold; Mexico and Upper Peru were the most productive, and possessed some deposits that proved amazingly rich. Zacatecas, the first of the great Mexican silver regions to be opened up, began to be worked seriously in the fifteen-forties. The city of Zacatecas was laid out in 1548; other boom towns followed in a mad rush to the diggings surpassing even that to California three centuries later. The other important silver sections of colonial Mexico were San Luis Potosí and Guanajuato, the latter ultimately proving the most valuable of all. During this period the Mexican mines supplied one third of the world's supply of silver. In 1545 the great silver treasure of Potosí, Upper Peru, became known through a discovery said to have been made by an Indian clambering up a steep mountain side after a straying llama. Two years later the city of Potosí was founded, and was given the title *villa real* (royal city) by Charles V. The mines of the region soon became the greatest source of silver in the world, far exceeding those of Guanajuato and placing the silver output of the Indies much ahead of the gold. Before the close of the colonial era the total output of the Potosí mines, calculated on the basis of the royal "fifth," amounted to more than one hundred and sixty-three million pounds; but the actual yield was unquestionably far greater, since a large fraction of the precious metals commonly escaped registry.

In the early days the gold was extracted by washing in wooden basins, or troughs, and by means of mercury; the silver also was washed out, or secured by the application of heat or by the use of salt brine. In 1556, however, a revolution in silver-mining began through the introduction at Pachuca, Mexico, of the process (said to have been discovered by a German miner) of amalgamating silver, as well as gold, with mercury. This method of extracting silver was soon generally adopted, and had a marked effect upon the total output, for low-grade ores not previously capable of being worked were forced by means of mercury to yield up their silver treasure. Quicksilver, which soon became a government monopoly, was at first supplied from Europe, much of it coming from the Almaden mines of Spain; but in the latter half of the sixteenth century rich deposits of mercury were discovered in Peru and thereafter supplied a considerable portion of the amount of the metal needed in the Indies.

Salt, which was abundant, was mined in various sections; and copper, the most important of the baser metals extracted during the colonial period, was a product of Hispaniola, Cuba, Venezuela, and especially Chile; but the total amount of colonial copper was quite inadequate to the local needs. Mining for emeralds was a fairly important industry in New Granada; and in Mexico opals, and turquoises and other semiprecious stones were produced in unusual abundance.

Pearl-fishing was carried on along the mainland coasts and islands of the Caribbean, on the Pacific side of the Isthmus of Panama, and in the Gulf of California. Where the water was shallow the Indian workers went out in small square-sailed boats and raked the ocean floor for the pearl-forming oysters, but in deep waters the gems were obtained by diving. On the southern coast of Panama were found unusually large pearls, some weighing as much as thirty carats. Those from Margarita and other islands off the coast of Venezuela, however, though smaller in size, were more beautiful.

Though the forest resources of the Indies attracted little attention in comparison with the mineral wealth, their exploitation on a small scale began at once. Timber for building and cabinet purposes not needed locally was shipped between colonies, and the finer woods, such as mahogany and rosewood, were supplied to Spain as well. Perhaps of equal interest were the dye-producing trees, especially fustic, which was hunted in the West Indian and Mexican forests for use in making yellow dye, and logwood, common in tropical forests and prized for the black dye that it yielded. In this connection might be mentioned the cochineal insects found on the nopal cactus in Mexico, Central America, and Peru and much in demand in Europe for the beautiful fast scarlet, crimson, and orange tints that could be produced from them. Shortly after the coloring qualities of the cochineal became known to the king through the invasion of Mexico, he ordered that as much of it as possible be collected and sent to Spain. This hastened the exploitation of the insects found on the wild nopal and led to the cultivation of the cactus. More appreciated, however, than the products yielding dyes were the medicinal plants, secured from many parts, particularly cascarilla and cinchona[1] from the Andes region.

The very nature of Spanish America, with its wide stretches of grassland, insured the early development of herding and ranching. Live stock, both for food and for transportation uses, were brought over by almost every early expedition, and they throve remarkably, especially on the luxuriant grasses of the Orinoco valley and the broad basin of the Plata. Horses, cattle, and pigs ran wild and developed into new breeds.[2] These and their tame kindred, as well as sheep, goats, mules, and donkeys, soon existed in large numbers in the New World, particularly cattle and sheep, which were of special commercial importance. In New Spain in the seventeenth century some ranchers were reported to have as many as fifty thousand head of cattle. Here and in other parts where the raising of cattle and sheep was of special importance ranchers and traders were, as in Spain, organized into mestas to protect their interests. Sheep were chiefly valuable for their wool, and cattle were raised on a large scale for their hides, horns, and hoofs; but in the later part of the colonial era the flesh, especially the tongue, began to be saved. It was cured by being salted and dried in the sun, in which form it was usually called *charqui*.[1] Horsehair also was of commercial importance.

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[1] The plant was named for the wife of the count of Chinchón, viceroy of Peru in the early seventeenth century, who was cured of malarial fever through using it. After returning to Spain she was instrumental in making its medicinal qualities well known there. Quinine is one of the alkaloid products of cinchona.

[2] The small tough mustangs, or bronchos, of the southwestern part of the United States are descendants from horses that escaped from the early Spaniards. The longhorn cattle of Texas and the "razorback" swine of the southern forests also evolved from Spanish forbears.

In spite of the primary interest of the Spanish crown in the extraction of precious metals, very early in the sixteenth century it made a serious effort to encourage colonists to till the soil, for it well knew that agriculture was the necessary basis for a healthy, stable colonial society. Immigrants who would agree to engage in farming on Hispaniola or on the adjacent mainland were offered many inducements, such as free passage, free land, seeds, live stock, implements, and exemption from certain taxes for a period. The government also offered prizes to persons who would undertake on an effective scale new branches of husbandry, such as silk-raising and spice-growing. The response was slight, however, for those who were early interested in the Indies were adventurers, not husbandmen. The gold and silver mines held out fatal counterattractions, and in spite of royal efforts many of the subsidized farmers abandoned their plows and rushed off to the rich mainland "diggings" which were soon reported. Consequently Hispaniola reverted to cattle-raising.

However, after the first spectacular mining discoveries had been made and the uncertainty in connection with the industry had become more apparent, an increasingly large number of the colonists took up some branch of agriculture. Many of the economic plants peculiar to the New World—maize, tobacco, maguey, cotton, potatoes, vanilla, cacao, and Paraguay tea—were cultivated on a large scale by the Spaniards and improved in quality and size. Tobacco, vanilla, and cacao became important articles of export to Europe, as has already been stated

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[1] Known as "jerky" in the United States.

(see page 171). On the other hand, through the efforts of the House of Trade and of private persons, European plants were introduced into the Indies. On his second voyage Columbus brought sugar cane, and a little later Canary Islanders who were capable of building the mills necessary for grinding the cane were sent over. As a stimulation to the new venture, in 1520 Charles V freed from import duty the materials needed for constructing the mills. Thus aided, the sugar industry spread rapidly, and by 1535 there existed in Hispaniola alone more than thirty sugar works. Cortés, who, more than any other conquistador, tried to develop the land which he conquered, introduced cane, as well as other European plants, into Mexico; and by the middle of the sixteenth century that colony was exporting sugar to Peru and to the mother country. Silk-raising was also attempted early, and for a time flourished greatly in Mexico; but the jealousy of the Spanish silk-growers caused it to be abolished by royal decree in 1679. Vine-growing and olive-growing were by turns fostered and frowned upon by the crown, the latter attitude being prompted by jealousy in Spain. During the periods of the ban, however, it was very difficult to prevent production for local use; hence officials devoted most of their energy toward preventing American-produced oil and wine from being sent to the nonproducing sections which supplied the best markets for the Spaniards. Rice also was brought in, and flourished in the subtropics of South America as far as Tucumán. During the late eighteenth century flax and hemp were successfully introduced into the Plata region, and wheat into Chile, where it became the most important crop.

The ox was the animal most generally used for agricultural labor. The tools and implements on the farm remained of medieval simplicity even to the close of the colonial era: Spanish America, like its mother country, was practically untouched by the mechanical revolution. The aboriginal method of planting by means of a pointed stick was common in alluvial soil, but wooden plows—often made from the forked branches of a tree—were used, especially where cereals were grown. Grain crops, as everywhere at the time, were cut with knives, the straight peasant *machete* being frequently used, and were threshed with flails or by driving live stock over them. The mills on the sugar plantations were simple affairs made of wooden rollers, usually placed upright, which crushed the cane and pressed out the juice. They were worked by hand, by oxen, or by water power. The raw juice was usually manufactured on the spot into molasses, rum, or sugar. Many of the plantations had claying plants for refining the sugar.

Manufacturing in many other branches made progress. Most of the aboriginal crafts persisted, especially in the sections remote from the coast, where imported goods, when they were obtainable, were prohibitive in price. On the haciendas, or ranches, as at the mission stations, articles were made (usually by Indian labor) according to aboriginal as well as European models; but as a rule the haciendas merely aimed to be self-sustaining, whereas the larger missions deliberately produced a surplus for sale. Thus, the Jesuits of Chile early became famous for the furniture made under their direction, which found its way into markets at some distance; and the Franciscans of California also turned out tables and chairs which later became the models of the popular "mission" style of furniture. Along the coasts and in the cities manufacturing more definitely followed European standards and tastes; and here were found workers in practically all lines—iron-founders and designers, goldsmiths and silversmiths, saddlers, potters, weavers, cabinet-makers, and others engaged in industries of lesser importance.

Naturally certain sections tended to specialize in certain industries. Peru was noted for work in metals. In Lima was a foundry which cast cannon for the artillery, and in Arequipa was another famous for its church bells. After the destructive earthquake of 1746, the bells for the new Lima Cathedral were made at the Arequipa foundry, one of these bells weighing more than fifty thousand pounds. In Peru much fine work was done in silver. New Spain produced furniture and carriages on a large scale. Puebla in that viceroyalty won fame for its blue and white glazed porcelain, its decorative tiles, and its blown glass; but the unglazed pottery from the Guadalajara section, with designs plainly showing Chinese influence, coming through the Philippine trade, also attracted considerable attention.

One of the most extensively practiced of the crafts was weaving. Wherever cotton was grown, it was made into cloth. At the close of the eighteenth century Peru had four hundred weaving establishments, engaged in working up cotton. The city of Cochabamba alone used a hundred thousand pounds of cotton thread a year. From the looms of Peru, Ecuador, and Mexico came also fine woolen fabrics; and Mexico made hats superior in quality to those of Spain in sufficient quantities to export to Peru. Mexico became famous for the manufacture of silk textiles, including satins, taffetas, and velvets, which, except for occasional inferiority in dye, were equal to those from Europe. As early as 1543 velvet was reported to be woven in more than forty different establishments in Mexico City; and work in silk continued to be of much importance in the viceroyalty for more than a century. But the industry was destroyed by a royal decree of 1679, as was also the production of silk. Even more than a century before this the Spanish crown, in the hope of stimulating the woolen industry at home, had tried to restrict it in Peru, but to little avail; for the Spanish supply failed to meet the needs of the Indies, and the Peruvian manufacturers were able to influence the local authorities to omit the enforcement of the royal will.

At various points on the coast—notably at Guayaquil, at Havana, and at San Blas, Mexico—were busy shipyards where vessels used for transatlantic service were built, as well as boats restricted to American waters. On some of the rivers too (especially those along which timber was abundant) there was considerable shipbuilding. Paraguay, for instance, constructed five frigates, eight brigs, and a large number of lesser craft in 1801.

Notwithstanding the spasms of prohibitory legislation indulged in by the crown, commerce (intercolonial as well as local) developed on a considerable scale, for the fact that the mother country could not supply the needs of the colonies furnished a powerful stimulus, as did other considerations. Surpluses from different parts of the far-flung Indies were consequently interchanged quite actively. In general, the warm tropical lands sent their excess to more temperate regions and welcomed that of the latter, and the rugged mining sections were partly supplied by the agricultural valleys. Thus Chile shipped to Peru wheat, flour, dried fruit, charqui, tallow, and cordwain, and received in return sugar, rice, cacao, and other like tropical or subtropical products. Paraguay exported to the lower Plata basin tobacco, oranges, manioc, leather, and yerba maté in exchange for horses and manufactured goods from Europe smuggled in by Buenos Aires. Because of its great diversity of climate Mexico was more self-sustaining than the other parts of the Indies and hence exported more to the other colonies and received less from them. Often, however, the market sought had nothing to do with reciprocal interests, as is illustrated by the fact that the cattlemen of the Plata region, where their animals brought only a peso a head, drove their herds through the passes of the Andes to Chile, where double the home price was at times obtained.

Every town and village had one or more market places where merchandise was offered for sale in sheltered booths or out in the open, but the sellers in the Indies often found themselves handicapped, as were merchants of Spain, by price-fixing. In the Indies such commercial regulations were usually made by the local cabildos or the corregidores, and most commonly were concerned with the necessaries of life, such as food, clothing, and drugs. In the more isolated parts commercial transactions were usually in the form of barter, though frequently staple products passed as currency. In the Plata basin, where metal coin was rarely seen until early in the seventeenth century, this was especially true. Cattle, hides, and the like were units of value in the southern part of the region, and in Paraguay yerba mate was also used as money. In the mining regions gold dust and silver bullion, weighed in scales carried by the merchants, were for some time the chief currency; but, owing to the interest of the crown in rental from the mines, a certain standardization of value existed from the first through the work of the establishments set up by the royal authorities for evaluating and stamping the metals. For the convenience of the colonists the government later founded a number of mints in leading cities from Mexico to Santiago de Chile. The largest coin in use was generally the gold peso (*peso de oro*), and the smallest the *maravedí*, valued at something like one four hundred and fiftieth of the former. The common peso, in contrast to the peso de oro, was of silver and was generally worth a little more than half as much as the latter. Money values fluctuated much, relatively and actually, especially during the periods of great gold and silver discoveries; but it may be of some aid to recall what has been said in other connections about the purchasing power of the common peso (see page 173).

Trading by land was greatly handicapped by lack of transportation facilities. The roads were very poor as a rule, the best ones being paved with rough, uneven stones. The relation of roads to commerce is evident from the fact that the improvement of the highway over Uspallata Pass in the first part of the eighteenth century resulted in a marked increase in the illicit trade between the Plata region and Chile. Petty aboriginal merchants bound merely for the local market place usually carried their merchandise on their heads or shoulders; the more prosperous loaded their wares upon llamas, donkeys, or mules. Over the long, rough trails, such as that followed by merchants of substance or adventurous spirit from Buenos Aires to Lima, caravans of pack mules were used, and stops for trading were made at Córdova, Tucumán, Potosí, La Paz, and other important centers. Thus a little more of life was given to these remote inland towns. The most common vehicle was the heavy, springless cart, drawn by one yoke of oxen, with wheels often mere crosscuts from a tree trunk. This was found from Upper California to southern Chile, lumbering creakingly over the deeply grooved roads. In the Plata basin it was customary to drive over the flat, untracked plain, four-wheeled wagons drawn by horses or mules being used as well as ox carts. Where river transportation was available, goods were carried in various kinds of water craft. Merchants of Paraguay used a form of flatboat or raft called a *jangada*, for floating their wares down to Buenos Aires and way points. After selling the cargo they often disposed of part or all of the wood of their vessels, since wood was in demand in the treeless regions of the south, and purchased horses or mules to carry their less bulky return cargo of manufactured goods from Europe; or for the voyage home they made smaller water craft from wood retained for the purpose. This procedure very closely resembled that of the frontiersmen of Ohio and Kentucky, who carried their produce down the Ohio and Mississippi to New Orleans.

The most important trade routes were the coastal ones, which were fairly safe; for the vessels following them suffered little from pirates, who were usually looking for bigger prey. The longest and most laborious voyage generally made was that from Callao to Valparaiso, which, because of the Humboldt Current and the prevailing south winds, commonly took three months; the return trip was made in a third of the time. In 1563, however, Juan Fernández, a navigator of experimental mind, made a detour well to the west in search of better sailing. This resulted in the double discovery of the islands named for him and of the fact that at a considerable distance from the land winds and waves were so favorable as to make it possible to cut to a third the time formerly needed for the voyage south. Thereafter mariners followed the new route, to the advantage of coastal commerce.

As in all frontier regions, free labor was hard to get in the Indies; for where there is opportunity to work with profit for oneself, few are willing to go into the employ of others. Furthermore, the Spanish contempt for manual toil was brought into the New World at the outset. The available free labor was largely limited to the trades which were under control of guilds like those of Europe. In Mexico City alone there were at least a hundred of these crafts brotherhoods in the days of the crown régime, and in other cities they existed in a like proportion. The guilds were definitely under municipal supervision, and membership was in general limited to whites. Most of the unskilled labor was done by aborigines, who were usually kept in an unfree condition corresponding to serfdom in Europe, or were out-and-out slaves.

It was not, however, the fault of the crown that the conquered race was thus oppressed and forced to toil. Isabella and Ferdinand in the very beginning ordered that the aborigines be treated kindly, and their successors during most of the colonial period struggled honestly to prevent the natives from being wronged; but they were unable to cope with the selfishness and greed displayed by their subjects thousands of miles away, especially since even high colonial officials were often in collusion with private individuals. Christopher Columbus himself began the subjection of the Indians through ruling that labor might be accepted instead of money tribute, which he found it hard to collect. When Ovando went out as governor of Hispaniola he was instructed that the Indians should be left free and should be taught the Christian religion; but he soon reported that unless compulsion was used they would not work even for wages, and, furthermore, that if they were unrestrained they would isolate themselves from the Spaniards, making it impossible to instruct them in the doctrines of the Roman Church. Consequently in 1503 Ferdinand ordered that the Indians be made to trade with the whites and to labor for them, but he stipulated that they should be paid for their work and taught Christianity.

Forced labor having once been sanctioned by the home government, it spread rapidly over the West Indies and was established in much of the mainland as the flag of Spain advanced there; but it existed in its worst and most comprehensive form in the mining regions, especially in Peru. At first groups, or *repartimientos*, of aborigines were officially allotted, under native foremen, to parts where their labor was needed. This led to grave abuses, and the *encomienda* system, which was early used in the islands, took its place. This, as was stated in another connection, gave persons the right to draw upon Indian labor in certain specified villages; but the law definitely provided that the natives should be paid for their work, be treated humanely, and be taught the Christian doctrine.[1] In the interest of guarding the aborigines against extreme hardship it was further stipulated that for the work in the mines the natives should be divided into *mitas*, or shifts, to be drawn upon in turn. The labor system involving coercion of the Indians was, however, abused from the first, especially in the mining sections of Peru. The aborigines were made to work long and hard; pay, if given, was often a mere pittance; even food and drink were lacking at times; and religious instruction was often neglected. The corregidores, who were given special charge over the Indians, as has been shown were often their worst oppressors; the clergy were their kindest masters and surest protectors.

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[1] The original distinction between the repartimiento and the encomienda seems to have been that indicated here, but the terms came to be used almost interchangeably.

Among the various churchmen who labored to guard the aborigines from oppression the most famous was Bartolomé de las Casas, known as the "Apostle of the Indies." For a time Las Casas had a repartimiento of Indians in Cuba; but he became convinced that the natives were being wronged, gave up his laborers, and began to work against the exploitation of the aborigines in general. He visited Spain repeatedly in their behalf, and in 1516 Cardinal Jiménez made him official protector of the Indians. One of the wrongs that early roused Las Casas and others was the branding of free natives and forcing them into bondage, as took place in Mexico and other parts, especially in the first half of the sixteenth century. But the more widespread abuse was the whole system of working unfree aborigines. To meet the need for laborers, Las Casas urged that the Spanish government have Negroes—who could better stand bondage—imported into the colonies on a large scale; but later he bitterly repented the recommendation when he came to feel that the black man was as entitled to his freedom as was the brown. However, the measure did to some extent take the crushing load from the aborigines. Las Casas also tried hard to reform the encomienda system, which he attacked vigorously, incurring as a result fierce onslaughts from the get-rich-quick *encomenderos* (proprietors of encomiendas). In 1542, in consequence of Las Casas's efforts to rouse the Spanish government, the comprehensive New Laws, for regulating relationships between whites and natives, were approved by the crown. Under these no new encomiendas could be granted, all who had abused their Indians must give them up, and the remaining encomiendas were to end upon the deaths of their present owners.

Some of the provisions for protecting the aborigines against minor wrongs were enforced; but those directed against the greatest evils, especially the encomienda, were generally ignored, often with the connivance of interested royal officials or even with their open support. Subsequently official extension through four generations was given the encomienda system in response to the defiance and urgings of the encomenderos. It was not abolished until the reign of Charles III in the latter half of the eighteenth century.

Las Casas had hoped that the New Laws would wipe out the evil; but they ran counter to the selfish desires of the powerful and were already a dead letter when the reformer returned to the Indies three years after they were proclaimed. At first he was amazed over the situation, and later he was deeply depressed. Nevertheless, until his death at the age of ninety-two he continued laboring, though largely in vain, to save the Indians from oppression.

Though Las Casas was partly responsible for the large-scale introduction of Negro slaves into the Indies, the first ones were brought there in 1510, before he became interested in protecting the Indian at the expense of the black man. African slaves, as was stated in an earlier chapter, were supplied to the Indies largely through grants of monopolies, the best known of these being the asiento arrangement with Great Britain. But the work of the Negroes outside of domestic service was chiefly limited to agriculture or to handling freight at the ports, for they did not seem to thrive in the highlands, and the aborigines continued to toil in the mines and to share in the coarser work connected with the trades. Hence in the West Indies Negro slavery soon became established on a large scale in proportion to white population. Cuba was reported to have forty-six thousand African bondmen in 1775, and in some of the other islands blacks outnumbered whites; but for the Spanish-American mainland the figures were small. According to an estimate made by Alexander von Humboldt in 1822, the Negroes there did not total more than three hundred and eighty-seven thousand, and nearly two thirds of these were in the province of Caracas (now Venezuela), leaving a thin scattering for the rest of the continental Indies, where the blacks were found mostly on the coasts.

In general, the Negro slaves lived about as did the humblest Indian laborers, crowded into small huts and subsisting upon coarse fare. Though there were cases of extreme cruelty, such as branding with hot irons (which came under condemnation in Peru) or deliberate torture, on the whole they were not treated badly, as slavery goes. The black-slave codes were more humane than corresponding regulations in the Southern states of the American Union before the Civil War; and the attitude of the free white population toward the slaves was less warped by race prejudice and more mindful of the common humanity of bond and free. The clergy were the best friends of the black men, as they were of the aborigines, and did much toward giving the African slaves of the Indies a position which their fellows of Virginia or Alabama might have envied. They worked zealously for the conversion of the Negroes, slave and free, and in the treatment of worshipers recognized no color line. Owing to the influence of the Church, family relationships were respected among the slaves to a degree not seen in the southern part of the United States. Furthermore, emancipation was looked upon as a pious act, was encouraged by public opinion, and was fostered by the clergy and by the law.

IX

EDUCATION, LEARNING, AND THE FINE ARTS IN THE INDIES

Die Wahrheit ist vorhanden für den Weisen,
Die Schönheit für ein fühlend Herz.[1]
SCHILLER, *Don Carlos*, Act IV, scene xxi, line 186

EDUCATIONAL FACILITIES

IN VIEW of the great interest of those Spaniards who went to the Indies in gold-getting and material well-being, a remarkable amount of attention was given there to cultivation of the intellectual and artistic side of life. This was chiefly the result of clerical influence; for though temporal authorities, from the viceroys down, were in many cases active in promoting educational and cultural progress as a part of their duties, churchmen made up the educated class as a whole, and from them came the teachers and scholars.

It was not to be expected that serious effort would be made in the colonies to provide for general education; for literacy was unusual at the time, not only in Spain but throughout Europe as well, and the ignorance of the masses was a matter of indifference and even of satisfaction to government officers and to members of the privileged classes. Hence, though there was some zeal for popular enlightenment, those who chiefly profited from the schools that were established were the sons of the upper-class white families and those of high-rank mestizo blood, mixed Indian and white. In general very little opportunity for book-learning was offered to Indians or Negroes or to white girls. The few schools for girls were largely in the hands of nuns; and their education beyond the barest rudiments was frowned upon, especially in backward sections. It is recorded that a priest in Chile refused absolution to a girl who confessed to the sin of studying French. Perhaps most white women could not read and fewer could write.

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[1] Truth exists for the wise man; beauty, for a feeling heart.

The earliest schools of European model in the Indies were those founded in Hispaniola by members of the regular clergy, the first of which seems to have been started in the monastery of San Francisco in Santo Domingo for the sons of pioneer leaders of the colony. As time passed, the religious orders set up other schools of the same general type, though occasionally very promising boys of humble birth were admitted. Instruction was originally largely limited to reading, writing, arithmetic, and the Roman Catholic faith, but gradually *colegios* (roughly corresponding to the early academies of the United States) were established, and by the close of the colonial period they were found in many of the larger towns. The Jesuits were especially active in founding colegios, but many of these higher schools as well as institutions of elementary grade originated through the efforts of royal officials or municipal cabildos and were supported from the public treasury. Private lay individuals also at times started classes as a business enterprise or, in coöperation with others, to secure educational opportunities for their children. But educational progress was not uniform, and at the close of the eighteenth century there were marked contrasts in the advancement of various parts of the Indies. In the generally neglected portions, such as the Plata basin and Chile, elementary schools were few and even many of the larger towns lacked colegios, whereas in rich, populous sections, such as Peru and Mexico, the schools were superior in the quality and rank of instruction given as well as in numbers.

The Franciscans were the first European teachers in Mexico. They busied themselves with the education of the Indians at the outset, showing special interest in the sons of the caciques, partly with the idea of training them to be missionaries to their people. The most remarkable of the early Franciscan schools of Mexico was the first, founded by Pedro de Gante, a Belgian, shortly after his arrival in 1523. In it a thousand Indian boys were taught reading, writing, arithmetic, drawing, music, trades, and mechanical arts, as well as Christian doctrine. Another important school was that founded shortly after his arrival by the first viceroy, Mendoza, in coöperation with Juan Zumárraga, the first archbishop of Mexico. It was known as the Colegio de Santa Cruz de Tlaltelolco, and it gave instruction in some of the important Indian tongues, in Latin, philosophy, and medicine, as well as in more elementary studies. The teachers were Franciscans and included distinguished scholars and writers. In 1553 Mendoza started a school called San Juan Letrán for mestizo foundlings, and rather logically provided for its support by funds coming from the sale of stray ownerless cattle. The institution was under strict royal supervision and survived for more than three centuries. In Lima, Cuzco, and other cities of Peru schools similar to those of Mexico were founded, though less promptly, partly owing to the turbulence of the era of Pizarro. The energetic Francisco de Toledo, who was viceroy at Lima from 1569 to 1581, was especially active in furthering education.

Universities were established in the Indies to meet the educational needs of upper-class youths, many of whom had had to be sent to Spain to study, as well as to supply better training for the clergy than was afforded by the few colegios giving theological courses. Twelve universities were in existence at the end of the colonial era, and several of these had opened their doors before Harvard, the oldest university of the United States, was founded in 1636. In 1539 a university for Mexico began to be seriously considered, but it was not until 1551 that Mendoza made the idea a reality by founding in Mexico City, under a royal decree of that year, the Royal and Pontifical University of Saint Paul. Under the same decree originated the Greater University of Saint Mark in Lima. These were the first two universities of the New World based on European models. Seven years later the University of Saint Thomas Aquinas was created in Santo Domingo. Subsequently similar institutions for advanced and professional training were set up in other colonies, as a rule at public expense.

Of special interest was the University of Córdova in the province of Tucumán, which developed from the private benevolence of Fernando de Trejo, a Franciscan friar who was a native of Asunción and had for about twenty years been bishop of Tucumán. He had done much for education in his remote diocese, and it was his wish to crown his labors by founding a university in which could be taught Latin, the arts, and theology. Toward the support of the desired institution he gave a considerable sum of money and also his large property: "wrought silver, books, slaves, and inheritances . . . lands, mills, goats, and asses." As an educational nucleus for it he founded the Colegio Maximo at Córdova, which began work in February, 1614. Before the end of that year Bishop Trejo died; but in 1622 the colegio, with royal and papal consent, was raised to the rank of a university, and the following year it granted the first degrees.

Thus, by generous private endowment, one remote frontier of the Indies was supplied with an institution of higher learning. Quite different was the experience of Chile, where two of the bishops suggested to the king in 1602 that a royal university be established; but nothing was done. About a hundred years later, in 1713, the lack of facilities for training in law and medicine caused the cabildo of Santiago to petition the king to provide for the need. Twenty-five years of intermittent correspondence and conference followed on the subject, and in 1738 a royal decree was issued creating the University of San Felipe, named for the king's patron saint. In 1740 the decree arrived in Santiago; but owing to lack of money the setting up of the new institution was delayed until 1747, and it was not until nine years later that actual instruction began. Yet, in spite of the century and a half of waiting for it, the University of San Felipe proved rather weak and was poorly attended.

The fees charged by the universities were comparatively low, and some of them fostered attendance by distributing a number of fellowships annually. Under such encouragement thousands of students were enrolled in the classes in populous centers, such as Lima and Mexico. Between the years 1553 and 1775 the university at Mexico granted almost thirty thousand bachelors' degrees, about a thousand doctorates, and a considerable number of degrees of master of arts. The tax-supported universities of royal origin followed the medieval practice of having the rector elected by the students, the faculty, and the alumni, a method that tended to weaken the authority of the executive and make discipline difficult. At the University of Córdova, which was controlled by the Jesuits until their expulsion and then by the Franciscans, the students (who appear to have had no part in the control of the institution) were required to take an oath of obedience to the rector.

In a broad way most of the universities of the Indies were modeled after the University of Salamanca in Spain. Practically all the professors were clergymen—Franciscans, Dominicans, or Jesuits. The Jesuits were the most thorough and progressive, for they had become fairly free from the ideals of scholasticism and were interested in modern science as far as Church teachings permitted. Instruction was by lectures, usually delivered in Latin, and the teachers were interested in the student's capacity to remember facts rather than in his ability to think for himself. The receiving of a degree was chiefly dependent upon passing certain examinations, and in some places little attention was given to attendance upon classes. For a long time no examinations in courses were required at Córdova, with the result that there was frenzied cramming at the last for the public examinations for the degree, which resulted in inadequately trained graduates. A reform was instituted in 1680, whereby students were required to attend classes and pass annual examinations. The youths, who looked upon the ruling as an infringement upon their liberties and damaging to their dignity, broke out in rebellion; but the leaders of the movement were expelled and the remainder of the students were forced to yield to the authorities.

Most of the universities had faculties of arts, law, medicine, and theology. The course of liberal arts, like that in universities of the European Middle Ages, commonly included mathematics, Latin, logic, rhetoric, physics, and metaphysics; but in some of the institutions (notably those in Mexico City and Lima) the leading aboriginal languages also were taught. Partly owing to loss of the comparatively progressive Jesuit influence in the latter half of the eighteenth century, the universities suffered something of a decline, and at the close of the colonial era, after the institutions of northern Europe had begun to modernize, they still showed a strong medieval stress in their courses of study and their habits of thought. Despite their backwardness and general weakness, however, all the universities of the Indies were to some extent centers of culture, and a few (particularly the Royal and Pontifical University of Saint Paul of Mexico City) were superior to any educational institution to be found in Anglo-America at the time.

Besides the universities there were various professional schools and other related institutions that played a part in the intellectual life of the Indies. One of the most famous of these was the school of mines founded in Mexico City in 1783 by the eminent metallurgist José Fausto Elhuyar, who was at the head of the institution. The city had also a school of surgery of fair standing and a botanical garden that offered facilities for scientific study of the local flora. During the reign of Charles III groups of practicing lawyers here and there organized themselves into "Caroline academies" (*academias carolinas*, named for the king) for the further study of law, especially the laws of the Indies. The academicians had their own quarters, libraries, and archives, but the academies were looked upon as superior courses in the local universities. In some of the larger cities were literary societies, most of them interested in poetry. All the universities had libraries (which gave large place to works on theology), as did the better colegios, especially those established by the Jesuits. In a few of the capitals there were public libraries, the Real Biblioteca of Bogotá, formally opened in 1777, being stocked with books confiscated from four Jesuit colegios.

SCHOLARSHIP

Great interest was shown in research and writing; but many works of merit remained in manuscript, for the cost of publishing was very high, and some were finally lost. Connected with published works, however, are to be found at least a score of names of real distinction in informational writings and belles-lettres, most of them belonging to churchmen. As would be expected, many of the best productions are from the earlier period, before the expulsion of the Jesuits and while most of the other churchmen retained high ideals of scholarship. Naturally a large proportion of the writings of the clergy were concerned with religious discussions of little interest to the layman, but the missionaries and priests, as well as some persons outside the Church, gave much attention to other fields of learning, especially to descriptive science and narrative history. The members of the religious orders who went out into the wilds were especially stimulated by the new natural phenomena surrounding them, and they left behind them numerous treatises dealing with plant and animal life. Some extensive scientific surveys were undertaken; the most ambitious was the so-called "botanical expedition" set afoot in the latter half of the eighteenth century by the archbishop-viçeroy of New Granada, Antonio Caballero de Góndora, for the study of plants, animals, and minerals of the viceroyalty. It was headed by José Celestino Mutis, a Spanish priest, physician, and naturalist who, as teacher in Bogotá, had roused much interest in the study of science. For about twenty-five years the work of gathering and describing the specimens went on until the death of Dr. Mutis, whose unfinished *Flora de Bogotá*, with its thousands of careful, accurate drawings of strange tropical plants, attracted the attention of European scientists. His successor was Francisco José Caldas, the most brilliant of his pupils, who made a specialty of studying the flora of New Granada with reference to its geographic environment. In his herbarium were between five and six thousand specimens thus described and discussed.

It was New Spain, however, that showed the most significant intellectual activity along practically all lines. Other cities in the Indies called themselves the Athens of America, but Mexico was probably most deserving of the title. By the middle of the seventeenth century a survey of the minerals, flora, and fauna —less elaborate than that of Mutis—was made for the viceroyalty; it was published in Rome in 1651. The most noted scholar of Spanish America during that century was the Mexican Carlos de Sigüenza y Góngora, a surprisingly versatile man who wrote books of merit on many subjects, but was primarily a mathematician and astronomer. For a time he was professor of mathematics at the university in Mexico City. Later he was invited by Louis XIV to establish himself in France, but declined because Charles II had made him royal cosmographer, a position he appears to have held until his death in 1700. The coming of the Bourbon line to the throne in that year brought to Spain an intellectual stimulus reflected in the Indies by new interest in science. Eighteenth-century Mexico produced several men eminent in this field, three of them able astronomers. The most modern of the three was perhaps José Antonio Alzate, who was familiar with other departments of science also and wrote extensively upon them. A strong advocate of the experimental method, he scathingly attacked the medieval, unscientific attitude still commonly held toward natural phenomena.

Though Peru showed less general interest in natural science than did New Spain or New Granada, she did produce one man who in the depth and versatility of his learning was considered by some to excel even Carlos de Sigüenza y Góngora. This was Pedro de Peralta Barnuevo Rocha y Benavides, who did most of his extensive work in the first half of the eighteenth century. How far he ranged in things of the mind is suggested by the facts that he was for much time professor of mathematics in the University of St. Mark in Lima and was repeatedly rector of the institution; that he wrote and published works of merit in the fields of astronomy, metallurgy, civil engineering, navigation, and history; and that he also wrote dramas and, as poet laureate to the viceroy, poems dealing with public events.

Though the Spanish missionaries in the fervor of their religious fanaticism destroyed most of the records of the aborigines, they nevertheless showed much interest in the natives and the events connected with the conquest. Among the first scholarly writings which they produced in the Indies were, naturally, dictionaries and grammars in aboriginal tongues for use in teaching. Before the end of the sixteenth century books had been printed in ten different Indian tongues in New Spain alone. Perhaps the best early work dealing with the manners and customs of the Mexicans was that by the Franciscan Bernardino de Sahagún, one of the first teachers of the Colegio de Santa Cruz. The *Historia verdadera de la Conquista de la Nueva España* ("A True History of the Conquest of New Spain"), by Bernal Díaz del Castillo, the naïvely vain, lovable old soldier who in his youth accompanied Cortés, is generally regarded as the most reliable, as it is the most complete and fascinating, work dealing with its subject. Several able contemporary accounts were written on the aboriginal culture of Peru and the conquest of the territory; but the most unique and valuable is unquestionably *Los Comentarios Reales* (dealing with the culture of the Incas), by Garcilasso de la Vega, who belonged to both the old order and the new, since his mother was of Inca ancestry and his father was a Spaniard. Another writer of Peru, broader in his subject, was the Jesuit Bernabe Cobó, who was for some time connected with colegios there. His *Historia del Nuevo Mundo*, most of which remained in manuscript for two hundred and fifty years, devotes much space to natural history, but also treats of the political careers of Peru and Mexico in considerable detail.

BELLES-LETTRES

The output of imaginative literature was tremendous in the Indies, but quantity was usually more evident than quality, especially in the field of verse. The writing of poetry—most of it very bad and unworthy of the name—was encouraged in the larger cities by public contests, often held to celebrate some important political or religious event. At one of these which took place in Mexico in 1585 three hundred different persons submitted their effusions, some written in Latin and in Indian tongues as well as in Castilian. The prizes offered were numerous. One writer mentions a contest at which more than fifty prizes were given. The poetical standards of the sixteenth century were bad; but later, under Spanish influence, they became worse. Simplicity and beauty of thought and form were largely abandoned for the style made popular by the Spaniard Góngora —a style characterized by obscurity of thought and artificiality and complexity of expression achieved with a gaudy tinsel of words. Nevertheless the colonial age produced a few writers of genuine worth. Perhaps the greatest of these were the dramatist Juan Ruiz de Alarcón y Mendoza and the poet Juana Inés de la Cruz, both Mexican creoles. Ruiz de Alarcón, born in the last part of the sixteenth century, was one of the most distinguished writers in Castilian of the time; he was discussed in Spain in connection with Lope de Vega and Calderón, two of that country's greatest creators of comedies of character. Among his more than twenty-five plays two of the most notable are *La Verdad Sospechosa* ("Suspected Truth") and *Las Paredes Oyen* ("Walls have Ears"). Juana Inés de la Cruz, who was born in 1651, was so precocious as to be permitted to study subjects usually closed to girls, such as Latin, which she is said to have learned in twenty lessons. For a short time she was lady in waiting to the wife of the viceroy; but at seventeen she gave up worldly interests, entered a convent, and became a nun. Thereafter she devoted most of her time to reading, study, and writing, and became noted for her learning as well as for her poetry; in fact, the former was reflected in the latter, which showed profound and critical thought, though the form was somewhat marred by the artificial style of the time. Her writings, which included sonnets, epigrams, comedies, and other forms, were very numerous. In recognition of her worth Spanish contemporaries named her the "Tenth Muse."

PRINTING AND JOURNALISM

Printing was early introduced into the Indies. The first viceroy, Mendoza, brought with him the pioneer press, which, in 1535, was set up in Mexico City; about fifty years later one was started in Peru. By 1810 at least eight presses were in existence in Spanish America, scattered here and there, usually in the larger cities. Vertíz, the second viceroy of La Plata, to dispel the gross ignorance which he found in Buenos Aires, introduced there a press left by the Jesuits in Córdova. Chile, however, lacked facilities for printing until the movement for independence began. The first work from a press in the New World was probably a tract issued in Mexico entitled *La Escala espiritual para llegar al Cielo* ("The Spiritual Ladder by which to reach Heaven"). The earliest product of the Peruvian press was a catechism in the Quechua and Aymará tongues.

Journalism in the New World seems to have had its beginnings in Lima, Peru, where in 1594 an enterprising printer got out a leaflet to spread the welcome news that an English pirate had been captured. From time to time during the next century leaflets and pamphlets appeared in Mexico and Peru giving important local news or reprints from papers recently arrived from Spain. Early in the eighteenth century news sheets began to appear regularly, but all were short-lived. The first seems to have been the *Gaceta de México*, a monthly which began publication in 1722, but owing to governmental opposition only six numbers appeared. By the close of the eighteenth century Lima and Mexico had each a regular newspaper (that of Mexico being a semiweekly), and news sheets of a more ephemeral nature had appeared in a few of the other colonial centers. Obviously the papers that managed to survive for any considerable time gave their attention to the mere statement of facts (or what purported to be facts) relating to public affairs and to the publication of newly enacted laws, and refrained from such comments as might prove unwelcome to the public authorities.

In addition to the newspapers, there were published in various cities scientific and literary journals, such as the *Papel Periódico* of Havana, established in the seventeen-nineties to foster agricultural and economic development; the *Gaceta de Literatura de México*, for which Alzate was responsible; and the *Mercurio Peruano*, most famous of all. The *Mercurio*, which was devoted to literary and historical matter, was founded under the encouragement of Gil de Taboada Lemos, viceroy of Peru from 1790 to 1796, who offered for the columns of the review materials from the archives dealing with the realm.

THE INQUISITION AND THE PRESS

Akin to the iconoclastic attitude toward the culture of the aborigines was the policy of the Inquisition regarding products of the presses of Europe and the Indies. This tribunal was sharply watchful against all hint of the heretical or otherwise objectionable which might gain utterance by the printed page. All book-dealers were required to furnish Inquisition officials with lists of the books offered for sale and to take oath that they were withholding the names of none. They must also keep on hand catalogues of the books banned by the tribunal, and they were forbidden to offer for sale a private library without first submitting a detailed description of it to the censors and securing their permission. No books might be imported without warrant from officials of the Inquisition, who had the right to enter houses at any time in search of condemned publications. The output of even Jesuit presses was closely inspected. So strict were the censors that in the eighteenth century alone 5420 authors were said to be involved in works either expurgated or completely banned; and some of these writings were by the greatest thinkers of the period.

As a matter of fact, however, prohibited books did in one way or another enter the Indies, and were secretly circulated and even reproduced there; for example, despite the increased zeal of the authorities against French writings in the late eighteenth century, copies of Jean Jacques Rousseau's most inflammatory works were smuggled in, were translated into Spanish, and were quietly published. Nevertheless the censorship unquestionably tended to paralyze general intellectual activity in the Indies, just as it did in Spain.

MUSIC AND DRAMA

Music played an important part in colonial life; for several of the aboriginal groups were, like the Spaniards, fond of it. In the sections where the Indians were numerous they to some extent continued to play upon their crude instruments and to sing their ancient songs, in some cases modifying them under the inspiration of European ideas. At least one instrument used by the humble (especially in Guatemala)—the *marimba*—came from Africa through the slave trade. It was a sort of primitive xylophone to which gourds were sometimes attached for resonators. The favorite instrument of the white rank and file, as in Spain, was the guitar, which came to be adopted by the mestizos and even by many of the aborigines. In the wealthy homes in the cities the harp and the clavichord (later supplanted by the piano) were much played, especially by women. The larger cities had bands or orchestras, one of which in Mexico City was reported in 1786 to have five different kinds of instruments—viol, violin, violoncello, oboe, and trumpet. In the schools established by the Spaniards much attention was everywhere given to teaching singing to the children of the soil. Though the music of the operas occasionally given in large centers toward the end of the colonial era was usually mediocre, the sacred singing in the larger churches was excellent.

Mediocrity also characterized theatrical performances in general. Of these there were various types. In imitation of Old World practice, plays based upon Biblical themes were early given in the convents, but they were often grotesquely poor. The private dramatics (generally comedies), such as were presented in the viceregal palace in Mexico, were usually of a decidedly higher quality; but the public performances given in the theaters that existed in the larger cities by the second half of the eighteenth century were commonly very average in execution and low in theme. For this reason, apparently, the theater established by Viceroy Vertíz in Buenos Aires in the late eighteenth century was rather indignantly opposed by some of the clergy.

ARCHITECTURE

It was in the architecture of the Indies that artistic instincts were most successfully as well as most substantially expressed. To the achievements in this line hundreds of buildings still standing adequately testify. The structures put up by the Spaniards in early years, when danger from attacks from the aborigines was great, were plain and very substantial, resembling fortresses; but when peace and order had become secure handsome private homes appeared, and also many churches and other public buildings characterized by dignity and beauty of design. Naturally Spanish models were closely followed, especially at first, and in the buildings of renaissance type, then common, Moorish decorations were often seen; but here and there modifications and new elements, such as the serpent motif of the Toltecs, crept in. Nearly all edifices except churches were built around patios, and all stood flush with the street, which was reached through a large doorway. Dwelling houses of the late sixteenth century were commonly built with unbroken vertical lines for the walls, but occasionally they were elaborately decorated with relief work of stone or stucco. An example of this style, the plateresque, is the house of Francisco Montejo, dating from 1549, which still stands fronting the Plaza in Mérida, Yucatán. The façade bears the Montejo escutcheon carved in stone, on either side of which is the figure of an armored Spaniard with one foot upon the head of a prostrate Maya Indian. In the seventeenth century—the time of increasing elaborateness in literary expression as well—wall surfaces were more completely broken up through the introduction of the baroque style of decoration, which under Spanish influence developed early in the eighteenth century into the even richer and more intricate churrigueresque type. The iron grills which protected the street windows were at times highly decorative, as were the overhanging balconies characteristic of stylish mansions in the later part of the colonial era. In eighteenth-century Mexico military motifs became fashionable in domestic architecture, and civil and military officers were permitted to crown their houses with battlements; but only men of the rank of captain-general might place upon them gargoyles in the shape of cannon. There was, however, no aristocratic limit to religious decorations; instead they were encouraged. Hence over the doors or in the outer corners of many of the houses were niches holding the statue of the owner's patron saint.

Color, as well as form, supplied decoration to the buildings. Where the materials of construction were inferior, such as adobe, or clay and broken stone, outer surfaces of walls were stuccoed and coated with bright pigments, to which the deep red of the tiles almost invariably used for roofing added richness; sometimes, where climate permitted, frescoes were used. But the finest examples of colonial domestic architecture, which are found in Mexico, were often given color by the building materials themselves. Here many of the houses were built of deep-red *tezontle*, or porous lava, cut into small square blocks, with gray stone for strengthening the corners and edges of the structures. The handsome glazed tiles made at Puebla also frequently appeared in decorative combination with the tezontle. Some houses showed in their outer walls red lava blocks alternating with square tiles, on others the tiles were used as borders, and occasionally residences of the very wealthy were entirely covered with them. An example of this is found in the *Casa de Azulejos* (House of Tiles), which still stands in Mexico City. The original structure is believed to have been built about the year 1600 by the Count del Valle de Orizaba, but it was not until the eighteenth century that one of his descendants covered the outside walls with glazed tiles having designs in blue, black, and yellow on a white foundation.

Secular public buildings and convents were constructed on the same general lines as private houses. The churches, obviously, had peculiar features, and it was in them that colonial architecture reached its highest and finest expression. Money was not spared in the erection and decoration of ecclesiastical edifices, and in well-nigh every village was an imposing church looming far above the surrounding buildings and dominating them. The cities showed an astonishingly large number of fine church buildings. In general the type of structure was that found in southern Spain—the Renaissance modified by local influences. Most church buildings showed round arches, domes, and four-sided twin bell towers, though a single tower was not conspicuously unusual. Often (especially in Mexico) the domes and tops of the towers were covered, in what was called the Mudéjar style, with glazed tiles of different colors. Numerous examples of this survive. Decorations in baroque and churrigueresque were used on many of the churches from the seventeenth and eighteenth centuries which still survive. The façades and doorways are richly carved, and the interiors are crowded with ornamentation in the form of elaborately wrought railings, pillars and pilasters, saints' niches, pulpits, altars, reredos, and paintings. Much gold and silver was used in the interiors, and often large areas were covered with gold leaf. In Quito, Córdova (Argentina), and Mexico City, especially, richly decorated colonial churches are still found. The Compañía (Jesuit) Church in Quito is almost lined with gold leaf; and that of the Franciscans in the same city is also remarkable for the amount of gold used in decorating its interior, and for the corpulence of its carved figures of cherubs and saints. Mexico possesses the finest surviving churches having richly decorated exteriors. In the capital is La Profesa, begun in the late sixteenth century, perhaps the best example of the baroque style. A number of illustrations of the churrigueresque have come down to the present, the most noted among them being the Jesuit convent church of Tepozotlán, near Mexico City, and the church of the Santísima Trinidad and the Sagrario Metropolitano, both in Mexico City. The Sagrario, which is a repository for sacred objects, is joined to the right front corner of the cathedral. The two exposed walls are of deep-red tezontle, but on each, inclosing the door, is a wide gray stone panel in gracefully wrought churrigueresque, perhaps the most tasteful example in the New World of this elaborately decorative style.

The crowning artistic achievement of the Spanish colonial period was probably the cathedral of Mexico City, to which the Sagrario Metropolitano is annexed. This is the largest church building in the Western Hemisphere and perhaps the oldest still in use. It stands on the site of the Aztec temple which faced on the main square of Tenochtitlán and which was displaced by a Christian church erected by Cortés. Construction was begun in 1573 from plans drawn by a Spanish architect, but it was not until 1813, after nearly two and a half centuries of intermittent labor, that the last touches were put on the building. The twin towers, capped with bell-shaped domes, rise more than two hundred feet above the street, a fact hard to realize because of the excellent proportions of the whole edifice, which in its massive grandeur is very impressive.

SCULPTURE AND PAINTING

Sculpture and painting in the Indies were primarily religious in subject, and were to a great degree used to supplement church architecture. As has already been stated, attention was early paid to art training in the schools, and in most of them, perhaps, at least drawing was taught. A few special schools of art were established toward the close of the colonial era. The best of them was the San Carlos Academy of Fine Arts of Mexico City, which developed from a school of engraving founded by Charles III in 1778 as the result of a definite endowment and a valuable collection of plaster casts from the antique given in 1783. Much artistic stimulation also came from a number of works of great masters, including Titian, Ribera, Murillo, and Rubens, which were brought in for the churches, most of them to Mexico. Here and there in the larger cultural centers of the Indies were to be found European artists of distinction, some of whom gave lessons.

Almost from the beginning of Spanish occupation there was a large output of painting and sculpture, but it was primarily for religious uses and was crudely vivid, with little or no artistic merit. Before the close of the sixteenth century, however, works of ability in both these arts had been produced, some of them by mestizo or aboriginal hands. The best examples of sculpture were probably wood-carvings, which showed marked improvement with the passing of time, as is clear from the charm of composition and execution of the sculptured wooden pulpits and altars of some of the later churches of the colonial era; but the most notable wood-carvings were the crucifixes, saints, and madonnas, artistic in line and exquisitely colored with enamel and with gold leaf and silver leaf. The graceful crucifix done in

Mexico by Mariano Perusquía near the close of the eighteenth century is one of the finest of such pieces, as is also "La Concepción," by Perusquía's teacher, the Spaniard Manuel Tolsa, who was for a time director of the San Carlos Academy of Fine Arts and did his most important work in Mexico. Quito, next to Mexico City the greatest art center of the Indies, also produced some fine polychrome sculptures in wood. Perhaps the most famous Ecuadorean artist in this type of work was a seventeenth-century Indian named Manuel Chili, but better known as Caspicara, whose "Assumption of the Virgin" (now in the Franciscan church in Quito) and "Impression of the Wounds on Saint Francis" won him renown in Europe.

Manuel Tolsa is considered the greatest sculptor of the Indies, however; his most famous work is not a wood-carving, but a gigantic bronze equestrian statue of Charles IV, finely suggestive of determination, power, and motion, which now stands at one end of the Paseo de la Reforma in Mexico City.

In the Indies, as in Spain at this period, better work was done in painting than in sculpture. As was to be expected, the artists of the New World were much influenced by the masters of the Old World, especially the almost matchless Spanish artists of the time; nevertheless they were not slavish imitators, for they gave to their best canvases a distinctly creative touch. The finest paintings, especially those of Mexico, are characterized by softness of outline, clear, harmonious colors, strong composition, and, in many of the religious pictures, a certain spiritual glow on the faces of the righteous.

Some of the worthiest of the early paintings were in the form of frescoes on the church walls, and have perished, as have most of the canvases; but perhaps very few works of either type rose above mediocrity. In the seventeenth century, however, a considerable number of able painters appeared in various parts of the Indies, the most distinguished being from Mexico and Quito. The greatest of those from Quito was the mestizo Miguel de Santiago, who gained much inspiration from a visit to Spain, where he met the great Velázquez himself, and became the founder of the Quito school of painting. Santiago frankly followed the methods of the great masters, but he did so in a masterly way; he was especially noted for the boldness of his work and for his long, mellow brush strokes. Most of his canvases were religious in subject; but in the view of some critics his ablest and most independent works were his portraits of Fray Domingo de Brieva and Fray Pedro Pecador, now in the Franciscan Convent in Quito. These are not unworthy to be grouped with some of the finest paintings done by Santiago's European contemporaries.

In the seventeenth century many Mexican painters did work of decided merit. The greatest and most influential leader of the period was Baltázar de Echave, known as *el Viejo* (the elder), to distinguish him from his son of the same name, a less able artist. Echave el Viejo, who was born in Spain, was much influenced by Titian, and was famous as a colorist and a vivid realist. He painted large canvases, mostly on religious subjects, some of which have disappeared. "The Adoration of the Kings" (now in the San Carlos Academy), one of the finest of his surviving works, is notable for the strength and tenderness of the figures as well as for the clear, rich coloring. A much smaller and less ambitious painting is his "Saint Isabel of Portugal," which in its jewel-like detail and sweetness of facial expression anticipated Van Dyck.

Early eighteenth-century Mexico produced numerous able artists of the brush. Among the best of them were Sebastián de Arteaga, two of whose canvases were "Saint Thomas touching Christ's Side" and "The Espousal of the Virgin"; Juan Rodríguez Juárez, whose "Transfiguration" and numerous other religious pictures scattered about Mexico show a fine dignity as well as general skill in treatment; José Maria Ibarra, called the Murillo of New Spain for the warmth and harmony of coloring of his "Jesus in Simon's House," "The Samaritan," and other works, many of which hang in the Academy of San Carlos; and Miguel Cabrera, a mestizo, one of whose finest paintings, "The Virgin of the Apocalypse," which glows with color, is to be seen in the same place. But Cabrera is regarded as marking the beginning of decline in eighteenth-century painting.

X

SPANISH COLONIAL SOCIETY

Those families, you know, are our upper crust, not upper ten thousand.
COOPER, *The Ways of the Hour*, chap. vi

SOCIALLY the Indies had a bad start, and this tended to aggravate the influence of their permanent climatic handicap. As is apparent from what was said in Chapter III, Spain's population in the time of Ferdinand and Isabella was far from ideal colonizing material; and it did not improve with the passing of the centuries. Militarism dominated the national psychology; in the popular view, pride was placed above industry; and, by policy of the government, orthodoxy was more important than character. Moreover, those having these characteristics were precisely the ones who went to the Indies in largest numbers. The warlike and adventure-loving were especially attracted to the New World, as were the lazy and greedy, and both sought permission to go there. By a very strict rule of the crown only the unquestionably orthodox, who were frequently bigoted and intolerant, were permitted to do so. In other words, the colonists for Spain's over-sea possessions came from that portion of the population which was protected and favored because of its religion, not (as was the case of the basic element in most of England's thirteen colonies) those whose moral fiber had been tested by persecution for their faith. That a considerable fraction of the Spanish conquistadores and other early leaders who were in the Indies by royal permission were faithless, unscrupulous, and ready to commit crimes of violence is apparent from the records left by their chroniclers, and their followers were not better.

Furthermore, there is no reason to believe that the average quality of the population was improved by the addition of the many Spaniards who got in by means of forged immigration permits, or by the smugglers and other foreign adventurers, some of whom settled down in the Indies.

These colonists, whatever their origin, were at once subjected in their new homes to another demoralizing influence, the presence of a large aboriginal population; for it is a well-established fact that the impact between advanced peoples and those culturally backward, though hard on the characters of both, is likely to be more disastrous to the former than to the latter. The whites in the Indies were no exception to the general rule.

One of the earliest results of the meeting of the two races in the Spanish colonies was the beginning of a mixed-blood population largely born outside of wedlock—a situation especially encouraged by a law strictly prohibiting unmarried women from going to the colonies unless they were daughters or servants of migrating families. The racial blending was also accelerated by a decree of Charles V ordering that no obstacle be placed in the way of marriage between Spaniards and Indians. Though the Araucanian Indians carried off in their raids many Spanish women who became the mothers of mestizos, on the whole such unions were uncommon; usually the hybrids were offspring of Spanish men and native women. Indeed, some of the conquistadores became frankly polygamous at the outset, as is indicated by the fact that a treaty made in Paraguay between Ayolas and the Guaraní Indians stipulated that the latter provide from their group seven women for the Spanish commander and two for each of his soldiers.

Mixture quickly took place between Negroes and whites also, resulting in the mulatto; and unions between this hybrid and the one race or the other produced further racial shadings, each of which was given a name. The offspring of Negroes and Indians, who were usually known as *zambos*, were rather common in some parts. In the Spanish Indies racial distinctions were much less strictly drawn than in the United States, and for ordinary purposes people slightly negroid in appearance passed as whites.

In general the whites were found in largest proportion in the cities and large towns, as were also the mestizos in regions, such as Mexico and Peru, with large aboriginal populations. Mulattoes and other white and Negro blendings were, as would be expected, especially numerous in the West Indies, from which the aborigines early disappeared owing to Spanish oppression and to smallpox and other European diseases, and were replaced by Negroes. On the northeastern coast of Central America and in Venezuela, where Indians and Negroes were numerous, the zambo was very common. The primitive, independent-spirited *llaneros* of the Orinoco valley were generally of this type of hybrid.

What the total was of the pure-bloods and the various racial combinations at the close of the colonial era there is no way of knowing, but probably the figures suggested by Baron von Humboldt are approximately correct. According to these there were in the Indies about seventeen million people, made up, in round numbers, of seven and a half million aborigines, five and a third million mestizos, three and a half million whites, and a little more than three fourths of a million who were Negro or predominantly Negro.

There were four large, fairly distinct social classes. The first was restricted to the aristocracy of Spanish colonial officers. Upper-rank *criollos*, or creoles (people born in the colonies of Spanish blood), formed the basis of the second; but it also included the socially superior Spanish immigrants, numerous high-rank mestizos, aboriginal caciques, and members of the royal Inca line. Occasionally entitled to a place in the second class, but very unwelcome to the creoles, were aggressive aborigines or mestizos of humble birth who in return for a high price secured royal patents officially declaring them to be white. Below the creoles and their various annexes came the great rank and file of the population, who were free or virtually free; at the bottom of the social ladder were found the unfree Negroes and Indians. Each class felt contempt for those below, and these, in turn, looked upon their social superiors with envy often mixed with hatred,—a state of affairs not unpleasing to the royal authorities, interested as they were in having division in the population aid them in their work of governing.

The Spanish aristocracy—commonly referred to as *chapetones*, *gachupines*, *peninsulares*, or *godos*[1]—was drawn largely from the numerous class of nobles at home, but it included a few commoners who had gained distinction through becoming wealthy in the Indies. The members of this highly exclusive group were present in the Indies merely in their capacities as royal officers. Practically all the best positions in the colonies went to them. Of the fifty viceroys appointed for New Spain before 1808, only one was not a "peninsular," and of the six hundred and two local governors holding office in the viceroyalty up to that time only fourteen were born in the Indies.

The creoles were descendants of the conquistadores and their exploiting and colonizing successors, most of whom came from western Spain, especially Andalusia, Castile, Galicia, and the Basque provinces, and probably were mainly drawn from the lower middle class. However, some were from among the lesser nobles, and a considerable number received patents of nobility in reward for services in the Indies. Among the creoles were found most of the wealthy miners and the owners of large landed estates. Many of them, and also a few men with aboriginal blood, filled minor civil, military, and ecclesiastical offices. A considerable fraction, forming a sort of lower fringe of their class, were physicians, lawyers, and larger merchants. As a rule the creoles and their duskier social peers were less well educated than the members of the office-holding aristocracy; this partly accounts for the fact that they were given few positions of authority. However, the crown was more influenced by the belief that the creoles, attached as they were to the land of their birth, might place local patriotism above loyalty to their king—a view encouraged by the belief that tropical climate had a bad effect upon mind and character and by the common distrust felt by old, settled communities toward "colonials" reared in new and sometimes lawless frontier regions.

The proletariat, or third class, was an ethnic hodgepodge. It included humble Spaniards and creoles, mestizos, mulattoes, zambos, and Negroes and Indians out of bondage. From it came the artisans, petty merchants, professional beggars, small farmers, and free unskilled laborers of all sorts, such as the *peones* of Mexico, the *llaneros* of Venezuela, the *rotos* of Chile, and the *gauchos pobres* (poor gauchos) of La Plata. These people of the masses, who formed the great majority of the population, lived in poverty that frequently amounted to extreme wretchedness; for practically all the wealth of the Indies was in the hands of the two upper classes, who desired to keep down the laboring element.[1]

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[1] Literally "Goths." This word had come to be used in Spain as a designation for the aristocracy, and then for the aristocratic side in politics.

The white portion of the population, though courteous and good-natured, hospitable, democratic in their daily contacts, and possessed of great physical courage, were nevertheless, as a whole, warped in character; and this had a bad influence upon those beneath them. Intelligent self-control was lacking: emotion rather than reason dominated conduct. Sexual morals were bad among the men, but this was by no means peculiar to the Indies. Deeds of violence were common. Pride, arrogance, and fondness for material display and empty honors were as marked as in Spain. Disloyalty to trust, general undependability, corruption in office, laziness, and idleness were probably more general than at home. The upper classes looked directly or indirectly to the government to help them comfortably through this life, and to the Church to pilot them safely to desirable quarters in the next one. They showed much bigotry and superstitious devoutness, but little evidence of "pure religion and undefiled," a state of affairs not to be wondered at in view of the demoralization of the clergy. The inhabitants of the Indies were sheep without shepherds under conditions especially calling for moral and spiritual leaders.

The two lower classes, generally downtrodden, grossly ignorant, and superstitious, displayed in the sections where European influence was strong "all the vices of their respective races and very few of their virtues," as one historian has put it.[2] From the lowest free class came most of the criminals who met with punishment through the courts, for they were too poor to bribe the judges and other officials.

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[1] The condition of the Negro slaves and the badly oppressed aborigines was briefly treated in Chapter VIII.

[2] Carlos Navarro y Lamarca, *Historia General de América*, Vol. II, p. 358.

Partly because the Church made a virtue of indiscriminate alms-giving, beggars were very numerous and were a serious drag on society. Many of them were able-bodied professionals, not averse to receiving charity but too proud or too lazy to work. Down in the Plata basin, horses were so cheap that beggars could ride; and to the astonishment and amusement of travelers from northern Europe they did so, going mounted from ranch to ranch asking alms in the name of some saint or for the sake of the "Mother of God." Since general public opinion was not more intelligent than the attitude of the Church, they usually got the alms.

A more seriously predatory element were the robbers and brigands, who were especially troublesome in the mining sections, where wealth was accumulated, and prowled the city streets at night and infested the highways at all times. In New Spain, where brigandage and other crimes were especially common by the middle of the sixteenth century, improvement was achieved through the introduction in 1552 of the Santa Hermandad, made efficient against lawbreakers in the mother country by Ferdinand and Isabella. Action of this institution was almost as swift and sure as that of the vigilance committees formed in the wild mining period of California. The death sentence was very common, and there was no appeal from the decisions of its judges. For nearly a century and three quarters the Hermandad functioned; but toward the last it fell into a decline, and in 1722 it was displaced by the more summary and drastic court of the Acordada, which specialized on hunting down brigands and making the highways safe.

What has been said about the population of the Indies as a whole applies to the women about as much as to the men, but in many respects the women occupied a position apart. The contrast between the upper classes and the lower was greater for women than for men. Among the very lowly the women were free, as far as public opinion was concerned, to come and go as they pleased and to engage in all kinds of labor, even including work in the mines. Their sex relations were often irregular, in many cases because of the prohibitive marriage fees demanded by the clergy; consequently there was little real family life, and the children were largely trained by the mother alone.

Girls and women of the upper ranks, however, and even those of the masses who had enough of worldly goods to attempt to resemble the classes, were kept in the well-guarded seclusion required in Spain of women of corresponding groups. Rarely did they leave home except to attend Mass or to go on occasional shopping errands, and at such times they usually concealed their faces by drawing close the black shawl-like *mantos* which they wore over their heads. As was generally true at the time, marriage was the goal of all women in the Indies; and it took place at an early age, the parents of the contracting couples making all the arrangements. The women generally made loyal and devoted wives and mothers, dutifully recognizing masculine superiority by indulging their sons and meekly accepting unfaithfulness on the part of their husbands.

These women of the upper ranks, well supplied as they were with servants or slaves, spent much of their time in idleness, killing the hours with empty gossip, perhaps occasionally accompanied by fine needlework, the only manual occupation not regarded by them as degrading. Since they were generally ignorant and often completely illiterate, to a greater extent than the men they let the priests do their thinking for them. To intellectual interests they gave little attention, partly because of their lack of education; but, since they were well aware that most men preferred ignoramuses for wives, few women had the temerity to risk missing the matrimonial goal by displaying a fondness for things of the mind.

That there were exceptions to what has just been said almost goes without saying. Numerous individual women attained eminence quite apart from domestic interests and service of the Church. Among the poets of the Indies were many women, one of whom, Juana Inés de la Cruz, was given the first place among the writers of verse. This nun-poetess was, moreover, a learned woman who seems deliberately to have ignored matrimony. Another outstanding woman was Mariana de Querejazu, called in her day one of the three powers of Lima, the other two being the viceroy and the archbishop. To her salon came the intellectual élite of the capital to converse even on political matters with the brilliant hostess, who has been compared to Madame de Sévigné as a letter-writer. A few women gained some distinction through direct participation in public affairs: Catalina Montejo was adelantado of Yucatán after her father; Isabel Dávila, daughter of Pedrarias Dávila and wife of Hernando de Soto, was by the latter made acting governor of Cuba when he left on his last expedition, and filled the position for some time; Beatriz de la Cueva was elected mayor of Guatemala City by its cabildo after the death of her husband, Pedro de Alvarado, and owing to her wise administration became more beloved than he.

Obviously there was a vast difference between the living conditions of the humblest and of the highest classes of colonial society. The state of the lowest was not far from that of the poorest among the advanced aborigines in pre-Spanish days. Their shelters were one-room huts lacking windows, the cooking being done outside by means of charcoal braziers and clay ovens. The furniture was of the simplest: in the mestizo homes, where the aboriginal blood was on the side of the woman, it consisted largely of baskets, of pottery jars for water, and of woven reed mats (*petates*) or hammocks for use as seats or beds. The huts of the poor gauchos on the treeless plains of La Plata were more individual, and represented an interesting adaptation to a new environment. The walls were of mud, roofed with the long, yellow grass of the pampas, and a bull's hide was used for a door. Hides commonly served for hammocks or beds, the long bones of cattle or horses thrust into the walls constituted the clothespress, and their sun-bleached skulls were the customary chairs.

As has been indicated, the haciendas, or country estates, of the well-to-do were often almost or entirely self-sustaining and included many laborers; hence they somewhat resembled medieval manors or villages. Upon them were various farm buildings, groups of huts for laborers, a chapel where services were held in the special interest of the latter, sometimes a store for supplying the workmen with needed commodities, and the residence of the owner or his agent, corresponding to the medieval manor house or to the "big house" on Southern plantations in the United States. This building was usually of substantial materials, with Spanish roof of red tiles. For the sake of coolness the rooms were large and the ceilings high. On many of the smaller haciendas the main building was a simple oblong or L-shaped structure, but on the larger estates the rooms were often grouped round a court in Moorish style. In the cities palatial elegance was at times displayed in domestic architecture, as was indicated in the preceding chapter. The rooms of the larger houses were often grouped about three patios; and among the very wealthy, two-story buildings were rather common.

The furnishings of such residences were generally luxurious, particularly in rich centers like Havana, Mexico, or Lima, and included expensive carpets and hangings, fine wood-carving, inlaid work in wood, ivory, and mother-of-pearl, carved and colored leather, Oriental porcelains, and ornaments and services of silver and gold. In the homes of the cultured and refined who belonged to the old aristocracy artistic taste was displayed in selection and arrangement, but the residences of many of the newly rich mining element were merely a confused and vulgar display of wealth.

Throughout the Indies, especially in the warmest parts, people rose early and retired early; and for a few hours during the warmest part of the day they dropped their work, closed the shops, and took a siesta. During this period the streets were practically deserted.

Three or four meals a day were customary among those of regular habits, but the very poor usually ate when they felt hungry, if they had food. Among the latter the fare was always simple and varied little. The diet of the humblest gauchos of La Plata consisted of nothing but meat, usually unsalted and roasted on an iron spit before an open fire, and their only drink was water. The llaneros of the Orinoco had cassava bread in addition, and they often managed to get sugar to make an intoxicating drink. Their tropical neighbors remote from the cattle ranges satisfied their hunger chiefly by means of cassava, plantains, and sugar cane. Wherever cereals were grown, from Ecuador to southern Chile, they were the chief food for the very poor, who ground up the grains and ate them dry or mixed with water. *Ulpa*, a combination of wheat meal and water, was the favorite sustenance of the Araucanians and mestizos of Chile and also of many of the poor whites. In Mexico and Central America, in particular, the staff of life of the lowly was maize, which was chiefly in demand for the thin unleavened aboriginal cake, given the name *tortilla* by the Spaniards, with whom it became popular. Beans made hot with red pepper were another favorite dish of the Mexicans. From the maize they made chicha, and from the maguey, pulque, the ancient intoxicating drinks of their ancestors.[1] In general, throughout the tropics fruit could be had for the gathering.

In cooking and diet the upper classes for the most part followed the Spanish custom, but they also cultivated and indulged many aboriginal tastes, such as fondness for yerba mate, cocoa, the hot Mexican sauces, and tortillas and other dishes from maize. The customary meals were overburdened with nitrogenous foods—eggs, fish, fowl, and heavier meats, cooked with much fat, usually olive oil. Except for maize, beans, onions, garlic, and peppers, vegetables played little part in the bill of fare; but fruits were much eaten. The meal ended with a *dulce*, or sweet dessert, of some kind, such as fruit preserves, candies, or custards. Among the higher classes wine was the customary alcoholic beverage.

In dress ancient aboriginal fashions existed side by side with those of Europe. The humble classes of the most advanced native groups were little influenced by the imported styles and continued to wear those of their pre-Columbian forbears, except that in some instances, under pressure from civil and Church authorities, they added to the amount of clothing worn. Mestizos, mulattoes, and lower-class whites commonly adopted aboriginal styles, especially in women's dress, which before the arrival of the whites was more ample than the men's. The square native capes of the types called by the Spaniards *manta* and *poncho*, however, were popular among all men of the humble classes in sections where they were known.

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[1] The problem of drunkenness among the lower classes received some attention from the authorities in the Indies. In certain sections it was illegal to sell wine or chicha to the Indians or free Negroes. Probably the fact that the aborigines of Guatemala distilled wine into brandy, which was especially harmful to them, was what caused the cabildo of Guatemala to oppose the importation of Peruvian wine.

In some places there were rather troublesome local developments in fashions, the most outstanding example being the *saya* and *manto*, which became very popular among the women of Peru. The former was a clinging plaited silk skirt; the latter (in Peru) was a capacious hood, the long cape of which was fitted snugly over the upper part of the saya by means of a draw string, while the top of the garment covered the arms, shoulders, head, and all the face except one eye—an arrangement which the wearer achieved by holding the edges of the manto in place with one hand. This garb, which was worn in the street and to church, caused considerable worry to the authorities as a deterrent to law and order and sound morals, and was repeatedly banned by the law; but to no avail. The women declared that they needed it as a protection while going upon errands of charity; but it doubtless survived primarily because of the advantages it offered to the untidy and the intrigante. Even after the wars for independence had begun, women went about the streets of Lima in saya and manto, defying the new decrees of the revolutionary government, just as they had ignored the laws of the old régime against the costume, the first of which had been passed nearly three centuries before.

In general the higher classes wore Spanish styles until the accession of the Bourbon Philip V, after which French fashions, adopted by the Spanish court, were considered smarter in the Indies and were followed in the larger cities. Tremendous interest in dress existed among all who had any social aspirations, and wild extravagance in clothing and jewels was common, especially in New Spain and Peru. In La Plata and Chile, obviously, those aiming at ostentation in dress were much handicapped during most of the colonial era by excessive prices as well as by lack of supply, for neither region had such wealthy classes as the mining colonies of New Spain and Peru. Of these it is hard to say which went to the greater extremes. All who could possibly do so clothed themselves in the richest silk that their means could procure. Referring to this fact in connection with Peru, a viceroy in the early seventeenth century wrote, "The gala dresses and clothes of the women are so many and so excessive that in no other kingdom of the world are found such."[1] Similar reports early came from Mexico, and in 1625 Thomas Gage, the English friar, wrote that the retinues of the nobles in the viceregal capital were "more magnificent and costly than those of the court of Madrid and of all the sovereigns of Europe."[2] The authorities repeatedly tried to restrain the vanity and extravagance by means of legislation adjusted to the various classes and races. For example, in some places free Negroes were forbidden to wear either silk or jewels. But no better success seems to have resulted than from the efforts to eliminate the manto and the saya; and the parade of excessively luxurious clothes continued until the end of the Spanish dominion.

The extravagant attention to dress did not carry with it a corresponding desire for personal cleanliness. Bathing was generally infrequent; perhaps it was unusual among many having social pretensions. Much casualness was shown even with reference to more sketchy cleansing. At the end of the Spanish régime the Mayas of Yucatán, whose frequent ablutions had attracted the attention of Bishop Landa in the middle of the sixteenth century, were still far more cleanly than the white element in the Indies.

Akin to the craze for display in dress was the desire to satisfy personal vanity and to arouse envy and admiration in others through the acquisition of titles and honors,—a weakness the crown was willing to capitalize. Hence more than one creole of humble origin was permitted to buy titles of nobility; public offices of minor class were purchased for the accompanying social distinction, as well as for the possibility of acquiring wealth through graft—or the rare ambition to be of public service; and the splendor and glitter of military uniforms made many a man willing to pay well for the right to parade in them. Even those kept from office by social and educational disqualifications found much childish satisfaction in the empty show, as is indicated by the fact that the French traveler Depons remarked upon seeing behind shop counters men in militia colonels' uniforms decorated with orders.

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[1] William Lytle Schurz, "Mexico, Peru, and the Manila Galleon," *Hispanic-American Historical Review*, November, 1918, p. 395.

[2] Alfonso Toro, *Historia de Mexico: la Dominación Española*, p. 361.

The people of the Indies, especially the idlers of the upper classes, devoted a large part of their time to recreations and amusements. Most of the pastimes were general and national in character, but some of them were local and apparently of American origin. The latter seem to have been found largely in the south temperate zone. In Chile, for instance, there was a great fondness for picnics in the country; and in La Plata the farmers made a festival of coöperative planting and harvesting much resembling the "bees" and "frolics" of frontier days in the United States. While the farmers with their laborers and work implements helped their neighbors in seeding fields or gathering crops, the women supervised the preparation of a festive meal. At these gatherings a racing game was played, in which men on horseback chased a leader who carried a banner or flag; but it was more popular with the neighborly guests than with the farmer, whose fields were often trampled badly as a result of the races. Hoop-rolling, played by adults, was also a favorite pastime in the Plata region, but it was brought from Spain. In Lima there was considerable interest in handball.

Everywhere in the Indies card-playing, cockfighting, and bullfighting were popular, and more or less betting took place in connection with all three. Numerous lotteries afforded additional opportunity for meeting the common desire to try one's luck. Music, from the strumming of the guitar to the program of the occasional opera, gave pleasure to many, as did amateur and professional theatrical performances. Masquerades were in great favor, and so was dancing in general, especially where the Spanish influence was strong. Dances of Moorish origin, brought in by the light-hearted Andalusians, were popular throughout the colonial period; but in the eighteenth century a new dance from Spain, the exciting fandango, somewhat supplanted these in the most fashionable circles.

Toward the close of the colonial era there were in the largest cities cafés at which people could entertain their friends and—at least in Lima and Mexico City—could supply them with refreshments made from ice and snow brought from the peaks of the Cordillera.[1] However, elaborate banquets in their own homes gave the wealthy a better chance for display. Another recreation which had good exhibition qualities and was therefore very popular was parading in plazas and avenues. Thomas Gage stated that two thousand or more coaches were driven back and forth every afternoon in the Alameda of Mexico City, "full of Gallants, Ladies, and Citizens, to see and to be seen, to court and to be courted." But the most generally absorbing diversions were the religious festivals, especially those doing honor to the patron saint of a town and those connected with Holy Week, and the public celebration of political events, such as the birth of an heir to the throne, the accession of a new ruler, or the inauguration of a viceroy. On such occasions the whole population made holiday. There were processions and parades, the band played in the plaza, and special bullfights were arranged. If the celebration was a political one, the city was perhaps decorated with banners, triumphal arches, and illumination.

In their visiting back and forth in the cities, as well as for journeys of greater length, Spanish-Americans used various means of transportation. Usually only poor people walked in the city streets. The wealthy often went for short distances in sedan chairs carried by slaves or servants. For longer journeys, especially where roads were bad or nonexistent, they rode on donkeys, mules, or horses. Large palanquins borne by mules hitched to shafts, one in front and one in the rear, were in use in very rough country, such as the Cordillera of South America. Heavy oxcarts were the customary vehicles for travel among the lower classes throughout the Indies, and carriages drawn by four horses or mules were employed by the well-to-do where there were roads. A few lines of public coaches existed between the more traveled points. At intervals on the important routes were *posadas*, or inns, where accommodations could be had for man and beast, and by previous arrangement fresh animals could be obtained.

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[1] The sale of ice and snow was a government monopoly, and was often carried on by venders in the streets of Mexico City.

Colonial cities were few and far between, and for the most part were small; but, thanks to royal orders, they were generally well situated, and laid out with an eye to beauty as well as to convenience. The importance of the harbors was recognized by the building of settlements upon all the best ones before the colonial era was far advanced. As time passed and the danger from pirates became clear, Santo Domingo, Havana, Cartagena, Callao, Lima, and all other cities of importance on or near the coast were inclosed by heavy stone walls surmounted by watch towers; but when the question of a harbor was not involved, then, for the sake of a cooler, more healthful climate as well as for safety, towns and cities were founded in elevated parts of the interior, where such existed. Several of the Latin-American capitals are among the most scenically beautiful seats of government in the world. The nucleus, or center, of the city was a large oblong plaza facing the points of the compass, and from it at right angles ran the four main streets. On all sides of the plaza were arcades for the convenience of the merchants, and fronting upon it were the governor's palace, the city hall, and other public buildings. The aim was to have the parish church or cathedral so placed as to attract by its beauty and dominate the city; hence it was often set apart (on an eminence, if possible), but in some cases it fronted upon the main plaza with the other chief structures. In that square, which in early decades was often used as an open-air market place, was usually a fountain from which women of the humbler classes secured water for household uses, carrying it home in large red earthen jars borne on their heads or backs. Trees and flowers planted by order of the local authorities often added to the attractiveness of this common gathering place of the population. Frequently one or more of the streets in the larger cities were bordered with trees; the poplar was a favorite, so that tree-bordered avenues in general were named for it *alamedas*. The streets were fairly wide, but only occasionally paved, and then with rough stones. During most of the colonial era they were filthy; for into them were thrown all sorts of refuse, and no public effort was made to keep them clean. The only scavengers were the flocks of turkey buzzards which gorged themselves on the miscellaneous garbage,—a situation not unlike that in the Southern cities of the United States at the time. These unsanitary conditions resulted in much illness, especially fevers, and the percentage of mortality was high.[1] During the day a varied traffic made its way through these untidy streets, the most picturesque element being perhaps the venders who wandered about singing couplets and quatrains on the superior merits of their wares. At night the streets were usually deserted except for the watchman, who made regular rounds crying out the hours; for until near the end of the colonial period even the largest cities had no street lighting, and shops closed when darkness fell. In most cities the curfew sounded very soon afterwards, warning people off the streets. Even where there were no curfew laws very few honest folk ventured out in the larger cities late at night except in cases of real necessity, and then they carried lanterns and were accompanied by armed guards, if possible. For there were no regular city police until the late eighteenth century, and gangs of robbers often prowled about ready to prey upon the unwary.

In the late seventeen-hundreds, partly as a result of the reforms of Charles III in the mother country, changes for the better took place in many of the larger centers from Mexico City to Buenos Aires. Oil lamps were set up along the most important streets, and police patrols were instituted. More attention was also given to paving, and street-sweepers provided with hand carts were installed. Thanks to the efforts of an energetic viceroy, Mexico City set an unusually high precedent in the reform movement and for a short period had the reputation of being one of the cleanest, safest, and most beautiful cities in the world.

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[1] The unusual death rate was partly due to the fact that the aborigines were exposed to European diseases, to which they were more susceptible than the whites, who had developed some immunity. This was especially true of smallpox, which wrought great havoc; but aid came at the turn of the eighteenth century through the introduction of vaccination.

XI

COLONIAL DEVELOPMENT OF BRAZIL

Tão notavel se fez a obra dos bandeirantes paulistas que, sem ella, não só o Brasil não seria tão grande em territorio, como a nossa propria historia não se teria orientado como se orientou.[1]—Rocha Pombo, *Historia de São Paulo*, p. 71

Political Administration

THE colonial career of Brazil had various parallels with that of the Spanish Indies, largely because of the common early history of the two and the later domination of Portugal and its colonies by Spain during sixty important years. Yet there were many differences between them. Brazil had peculiar problems which were met independently by the Portuguese crown or solved locally by its inhabitants, and it early developed a marked individuality.

Unlike Spain, the Portuguese government did not build up at home a special administrative machinery for the American possessions; instead, until the Spanish captivity they were subject to the rather casual charge of the existing political institutions of the mother country, being chiefly the care of the royal council. Some time after Portugal passed under control of Spain the latter created, for the administration of Brazil, a Portuguese Council of the Indies, which was much like its own colonial machinery of the same name. After the regaining of Portuguese independence the organization, renamed Transmarine Council, continued to have charge of civil, ecclesiastical, and military affairs in Brazil.

Brazil's early local administration, first by various independent pioneer settlements which elected their own leaders and later by the royal hereditary captaincies, has already been mentioned. When the latter were centralized under a governor-general stationed at the new capital built at Bahia, the feudal captains were permitted to retain their territorial rights, but lost their political control. Governors, or captains-general, who were to serve under the governor-general, were appointed for the captaincies with certain executive functions and also the control of the local militias, which were now provided for to protect Brazil against the French. In addition, each province was given a royal officer called an *ouvidor*, who was its chief judicial authority. Under the new régime the leading towns of Brazil were granted charters permitting them a considerable degree of self-government under their own councils and other officials. They jealously guarded these rights against encroachments by provincial authorities, regarding which they did not hesitate to complain directly to the crown.

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[1] So notable a work did the Paulist bandeirantes do that without it Brazil would not have been so extensive in territory, and our own history would not have been oriented as it is.

As the French continued to threaten Brazil, the Portuguese government, as a means of better protection to the colony, in 1572 divided it into two provinces—one with its capital at Bahia, including the territory north of Porto Seguro, and the other with its capital at Rio de Janeiro, taking in the remainder of the colony. For each division a separate governor-general was appointed. But the system was evidently thought unsatisfactory by the Portuguese authorities; for in 1578 it was abolished and the old order was restored, with one chief representative of the crown, stationed at Bahia as before. After the assumption of Spanish control over the colony four years later there were no serious changes in its administration. In 1640, just before the revolt restoring Portugal's independence, a viceroy was appointed, with his capital at Bahia; but his duties appear to have been very similar to those of the governor-general, who during much of the time thereafter was administrator of southern Brazil, with his capital usually at Rio de Janeiro. For a short period after the overthrow of Spanish rule the office of viceroy was permitted to lapse, and a captain-general was in charge, but it was revived in 1662 and continued until early in the nineteenth century.

Meanwhile the colony expanded, and various modifications were made in the administrative organization. By the close of the colonial era it was composed of several provinces of first rank known as captaincies-general—Pará, Maranhão, Pernambuco, Bahia, São Paulo, Minas Geräes, Goyaz, Matto Grosso, and Rio de Janeiro—and about a dozen territories of inferior rank commonly known as captaincies. These subordinate provinces were very definitely under neighboring captains-general or the viceroy, and without the consent of these officers the captaincy authorities had little legal power. But the captains-general, usually appointees of the crown for terms of three years, received many of their orders directly from that authority and, like the intendants of the Spanish Indies, could communicate directly with it. The viceroy who was captain-general of Rio de Janeiro could lay down certain regulations which the other captains-general were expected to obey; but everywhere there was a strong tendency to exercise local autonomy. For the administration of justice the colony was divided into two superior judicial districts, with seats at Bahia and Rio de Janeiro, whose judges had original jurisdiction in various matters and also heard cases appealed from the courts presided over by the ouvidores. A limited right of appeal from the courts of Brazil to Portugal was recognized. As in the case of the audiencias of the Spanish Indies, the viceroy and the captains-general presided over the highest courts having jurisdiction within their administrative units.

In the interest of protecting the Indians and securing honest, impartial rule, the crown prohibited officials from accepting presents or engaging in trade; but the rules were often violated, and much corruption existed. Perhaps the majority of crown officials, even including the viceroys, were more interested in making money from their positions than in rendering service. Though the royal visitation and the residencia were used to combat the evils, they were apparently no more effective than in the Spanish Indies; for the handicaps and temptations were of the same general character as existed in connection with Spain's colonies.

THE CHURCH AND ITS LABORS

As in the case of Spain, the Pope delegated to Portugal extraordinary authority over the Church in its colonies. A bull issued in 1551 gave to João III and his successors forever, in their capacities as grand masters of the crusading order of Christ, complete ecclesiastical control over their conquests. This concession carried with it the right to appoint the higher clergy, to collect and dispense money for religious uses, to hear appeals from colonial Church courts, and to prevent papal meddling.

Brazil came under the jurisdiction of the Portuguese Inquisition; but the latter had no regular council in the New World, and merely functioned through agents stationed in the colony for the purpose of spying out and punishing heresy and other delinquencies. However, there appears to have been very little real effort either to make or to keep the colony orthodox; for Jews and others of heretical taint were permitted to go there rather freely, and there is no indication that they were much harassed by inquisitorial officials after their arrival. This laxness in comparison with Spain is to be explained by the fact that Portugal was less bigoted than that country, as well as less attentive to affairs in its American possessions.

In 1552 the first bishop of Brazil was sent out, and established a see at Bahia. For more than a hundred years the incumbent supervised Church affairs in the whole colony; but in 1676 Bahia was raised to an archbishopric, and the bishoprics of Rio de Janeiro and Olinda (in Pernambuco) were created. Other dioceses followed later, making six or seven in all by the end of the colonial period. The bishops had authority to appoint the lower clergy.

In the early days the Church of Brazil was supported by tithes; but owing to the meagerness of the population this income was so small that the clergy declared they could not live on it and petitioned the Portuguese government to pay them fixed salaries. The crown accordingly abolished the tithes and provided for the support of the Church from the general public revenues. The result had marked influence upon the history of

Brazil; for the income of the clergy, though adequate at first, became very meager as the cost of living advanced, and attracted only men of the humble classes. Hence, though the Church became as corrupt in Brazil as in the Spanish Indies, it failed to develop the aggressiveness and power as well as the wealth which characterized it in the Spanish Indies.

The first priests came to the colony with the earliest settlers; but they apparently did more harm than good, since they were men in disrepute at home and gave a bad start to religious work in Brazil. Other priests came with the donatories and were established in different settlements. Apparently the pioneer missionaries to the Indians of Brazil were the Jesuits, six of whom, with Manoel Nobrega as leader, came out with Thomé de Sousa in 1549. These and their successors went into the wilderness to labor with the aborigines, whom they gathered into *aldeas*, or villages, and taught them religion and manual work, as did the Jesuits of the Paraguayan reductions. Before the expulsion of the order from Brazil in the latter part of the eighteenth century it had mission stations scattered in the back country from the lower waters of the Amazon to the São Paulo region, where work had been begun by José de Anchieta, who in 1554 founded a school, the Collegio de São Paulo, for the Indians in the wild portion of São Vicente captaincy. As in the neighboring colonies, the missionaries proved the best friends and protectors of the natives against the oppression of the greedy whites. Attention to the wrongs done the aborigines was first roused to a serious extent in the middle of the seventeenth century through the efforts of the Jesuit missionary Antonio Vieira, who, upon his arrival in Pará, was shocked to find that the aborigines forced to work in the tobacco plantations of the province were dying by the thousands under the cruelty of their Portuguese taskmasters. As a result of Vieira's reports on the situation, João IV issued decrees for the protection of the Indians and also created in Lisbon a council of missions which was given the care of the natives of northeastern Brazil. These efforts were only partly successful, however, and the Indians continued to be enslaved through most of the colonial era, though the introduction of

African Negroes on a large scale caused them to be less in demand as bondmen than they had been before.

In the vast stretches of country between the towns on the coast and the more distinctly Indian country the white settlers were at times so scattered as to make it impossible to build up parishes for them with settled clergy; hence they were to some extent served by itinerant priests, licensed by the bishop of the diocese. These carried upon a pack horse an altar and other necessaries for religious services and stopped and said Mass wherever they found enough people willing to pay for it. Where specie was scarce the padres accepted horses or cattle in compensation, and often made larger yearly incomes than did the settled clergy; but their lives were far more toilsome.

The parish work in the cities and towns was largely in the hands of the secular priests; but the religious orders soon established themselves there and undertook educational and charitable work. Authorized by the civil authorities, they founded houses of mercy in all the larger centers, which offered shelter to the wayfarer and more extensive aid to the orphaned, the sick, and the penniless. The Sancta Casa de Misericórdia (Holy House of Mercy) of Rio de Janeiro, founded in 1582 by José de Anchieta and open to all who needed help regardless of age, sex, color, or religion, became famous throughout South America for its extensive benevolences. In the latter part of the colonial era hospitals were established and other beneficent labors were engaged in by parish organizations known as *irmandades* (brotherhoods), usually composed of laymen. From one aspect they were mutual-benefit societies, since sick members were cared for through entrance fees and annual subscriptions; but they also engaged in building churches and hospitals, often securing money for the purpose by means of large donations and legacies.

IMMIGRATION AND EXPANSION; THE PAULISTAS

The great potential area of its American colony and the difficulties experienced from the first in protecting it caused the Portuguese government, after it realized the danger from foreign foes, to devote considerable attention to the settling and peopling of the region; hence the grants to the captains-donatories. When it became apparent that the captaincy system was not very successful for colonizing purposes, other methods were tried, some of them not for the good of Brazil. Accompanying Thomé de Sousa when he came out to take over authority from the provincial captains were four hundred convicts to be settled upon the land, as well as three hundred free colonists. Under the governor-general's rule also orphaned girls of good family were brought from Portugal to become the wives of the army officers, and orphaned boys were sent from the mother country to be educated by the Jesuits of Brazil that they might contribute a desirable element to the population. The orphan brides were supplied with dowries from crown land, some of it in tracts forfeited by donatories who failed to comply with the terms of their colonizing agreements;[1] and other later colonists were also granted estates, for there was territory in abundance. By such means the parts of the coast first frequented by the Portuguese were settled.

Those who did most toward gaining and holding broader frontiers for Brazil were the mameluke, or hybrid Indian and Portuguese, inhabitants of the southern part. They were commonly known as *Paulistas*, or Paulists, after the flourishing province that finally developed from Martim Affonso de Sousa's captaincy of São Vicente, renamed São Paulo for the city which grew up around Anchieta's Indian school. Owing in part to the comparatively bracing climate of the highland section in which they were born, but perhaps more to the qualities coming from mixture of two sturdy race elements, the Paulistas possessed a restless energy, a physical courage, and an aggressiveness not developed elsewhere in Brazil. In some respects they resembled the Araucanian-Spanish hybrid type of Chile; but in their activities during the colonial period of Brazil they were more like the Indian-fighting frontiersmen of the North American wilderness and plains, for both these pioneering types felt that it was their manifest destiny to occupy if they could and hold for their government the entire continent into which they pushed their energetic way.

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[1] Ultimately the crown bought, by grants of titles and other means, the territorial rights of the successful donatories, the last of them being extinguished in 1754 by the energetic marquis of Pombal, minister to King José of Portugal.

In search of gold, or Indians to enslave, or glory for their king and themselves, or merely in the hope of finding something new and interesting which might for a while satisfy their restless spirits, the Paulistas advanced north and west into the heart of the continent and southward toward the Spanish settlement of Buenos Aires. Their most significant activities began during the sixty years of Portuguese captivity to Spain, and were perhaps fostered by Paulista hatred of Spain as well as by the fact that during the period Spain thought little of the unmarked boundary line provided by the Tordesillas treaty of 1494 to set off Spanish territories in the New World from those of Portugal. But after the restoration of Portuguese independence the Paulistas continued their empire-making labors, pushing constantly farther to the west of the approximate treaty limits of Brazil. It was largely because of their enterprise that the Portuguese crown in 1680 founded Colonia del Sacramento on the north bank of the Plata, and that most of the Amazon basin was occupied and settled, thus finally bringing to the Brazilian nation an area about double that to which Portugal was entitled by the unexecuted treaty of Tordesillas.[1]

In connection with their wandering, exploring, and conquering, the Paulistas are commonly referred to as *bandeirantes*, from the fact that they invaded the wilderness in organized bands (in Portuguese, *bandeiras*[2]), each with its own flag and its military chieftain, whom all in the party solemnly swore to obey. Before leaving for the *sertões*, as the wild interior region was called, each man made his will, confessed his sins, and attended solemn Mass in recognition of the perils ahead. Sometimes the expeditions were wiped out by the Indians; sometimes they were absent several years and before they returned they had been given up for dead. If food supplies ran short, they paused to plant and harvest crops and then pushed on again into the unknown. In the latter part of the era of the bandeirantes (the late seventeenth and early eighteenth centuries), when the interior had become fairly well known and the dangers had lessened, the Paulistas took with them their families, household goods, and domestic animals, and formed pioneer communities far out on the new frontiers which their explorations had marked. They were crusaders against the wilderness, in the conquest of which they underwent great change, as did Daniel Boone and his successors in the North American West; for in their struggle with it they further developed the qualities of individualism, energy, self-confidence, ambition, and love of liberty which moved them at the outset to become the pioneers of a continent.

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[1] In 1777, after hostilities between Spain and Portugal which developed in the Seven Years' War, a treaty was made between the two at San Ildefonso for adjusting disputes over colonial territory. By it Portugal gave up claim to Colonia, Uruguay, and the seven Jesuit reductions to the east of the Uruguay River (see footnote on page 187), but was granted title to Santa Catharina in the south and also to a vast area in the Amazon basin; but boundary lines between the two colonial domains were not completely surveyed during the period, and this left bases for numerous disputes over limits after the colonies became independent.

[2] The early, less well-organized Paulista expeditions made into the interior in search of gold or Indian slaves, rather than with the thought of conquest, are at times referred to as *entradas*, or entries.

So strong was the spirit of Paulista independence by 1640 that when word arrived in the city of São Paulo of the successful revolt of Portugal against Spanish control, and the accession of João of Braganza, some of the leaders were inspired to plot independence for the province as a separate kingdom. An old man named Amador Bueno was settled upon as ruler; but the dream of independence quickly ended, for when Bueno's would-be subjects shouted "Long live King Amador!" he amazed them by the cry "Long live João IV!" and quickly sought refuge from their ire in a convent.

For a considerable time after the emancipation from Spain the southern province, still called São Vicente, was governed first from Bahía and then (beginning in 1659) from Rio de Janeiro, which was during that year made independent of the governor-general at Bahia. Rio's independence occasioned great restlessness in São Vicente and led to the demand there for a separate government for all the vast territory that the bandeirantes had conquered and settled. After repeated efforts the petition was finally granted, and in 1709 the great captaincy of São Paulo and Minas was formed; it included the old area of São Vicente and much more territory to the north, west, and south. To it was given a governor, or captain-general, independent of the authorities at Rio de Janeiro and, except for certain obligations to the viceroy at Bahia, responsible directly to the Portuguese crown.

In winning the territory which went to form the new captaincy, the Paulistas were a law unto themselves; but they were thoroughly alive and aware of their potentialities. It was this quality of conscious vitality that enabled them to secure the independent government which they demanded under the colonial régime and which later was to make them the dominating element in the Brazilian nation.

ECONOMIC ACTIVITIES

In its commercial policy Portugal followed the exclusive system of the period, but without an elaborate machinery like Spain's to use in an effort to enforce regulations. During much of the time but two ports of the mother country—Lisbon and Oporto—and four of Brazil—Bahia, Rio de Janeiro, Olinda, and Parahyba—were open to mutual trade. Moreover, in the interest of Portuguese producers and merchants, commerce between the northern and southern parts of the colony was prohibited. Portugal, like Spain, was unable to supply her colonies from her own products; and she was therefore willing to permit foreign trade with Brazil, provided that it took place through Portuguese ports. England, because of her power and of the early alliance between the two countries, was able to secure unusual commercial concessions, and by the middle of the seventeenth century many British merchants were established in Portugal and had their factors in a number of Brazilian ports. Furthermore, most of the commodities sent from Portugal to Brazil in the late seventeenth and early eighteenth centuries were of British origin; and this resulted in a balance of trade very favorable to England and against Portugal, for most of England's tropical imports came not from Brazil but from territory that had come under the British flag at the expense of Spain.

During the first few decades after Portugal had established actual control in her American colonies there was little serious attempt at monopoly. Foreigners were permitted to establish themselves in Brazil for trading, and in 1579 free commerce was granted between Santos and London; but this quickly ended when Spanish control over Portugal and its colonies began. In 1649 a general commercial company was established in Portugal to undermine the trading advantages to which the Dutch had helped themselves after occupying northern Brazil. The convoy system had been instituted by Spain, and the company agreed to send to Brazil annually two merchant fleets, each to contain at least eighteen vessels. To it were given unusual powers, such as the right to hire mercenary troops, and special privileges, including a monopoly of all trade in fish, wine, oil, brazilwood, and wheat flour between the colony and the mother country. All foreign commodities were to be sent in the vessels of the company, and therefore on the outward voyage they were largely freighted with British goods, which more and more took the place of those supplied before by the Dutch. In return for certain payments this company of Portuguese merchants, which was chartered for a maximum of thirty years, received various commercial advantages formerly enjoyed directly by the crown. In view of the fact that the monopoly included food supplies of first importance, the colonists were placed under an economic slavery to the company, which caused much resentment, especially in São Paulo.

Further feeling was roused against the *Companhia do Commercio do Maranhão*, founded in 1682 with a monopoly of exports and imports in connection with the province of Maranhão. Unfortunately for peace, when the company came into existence the planters of the captaincy were already much stirred up over the interference by the Jesuits—begun nearly a generation before by Padre Antonio Vieira—with the enslavement of the

Indians. To the inhabitants of the region it seemed as if the crown were seeking their economic ruin. Insurrection against the Jesuits and the company was quickly planned, with a *junta*, or committee, made up of two members each from the clergy, the nobles, and the commoners. The aim was to induce the crown by means of petition and armed demonstration to abolish the monopoly and banish the Jesuits. Letters and bulletins against the monopoly, in particular, were written and circulated. So strong was feeling that sedition was even urged from the pulpit. To secure a strong popular following at the very outset of the rebellion, the conspirators launched it in connection with a religious procession that took place on February 24, 1684, in the city of São Luis, or Maranhão. The chief military leader, who quickly became a great favorite with the masses, was a wealthy planter named Manoel Bekman. When news of the uprising reached the Portuguese government considerable alarm was felt for Brazil, for it was feared that the insurgents would unite with the French at Cayenne and help Louis XIV in his supposed ambition to acquire the Amazon valley. Consequently strong forces were sent out, which soon ended the resistance. Most of the leaders were pardoned or were punished by banishment; but Bekman and another were put to death after trial by an extraordinary tribunal. The monopoly against which the rebellion had been launched continued until the early part of the next century.

When José I came to the throne of Portugal in 1750, he gave virtually complete control of the government to his minister, the energetic marquis of Pombal, who made several changes in the commercial arrangements for Brazil. The fleet system was abolished, and two monopolistic companies made up of Portuguese merchants were chartered: one (created in 1755) to control the trade of Pará and Maranhão, and the other (which dated from 1759) to have the same privileges in Pernambuco and Parahyba. Partly because of the intense unfriendliness of the northern Brazilians toward the companies, neither company proved a success, and both were abolished about 1780.

Though the Portuguese system of restrictions and monopolies was injurious to the Brazilians as well as very harassing, it was generally ineffective; for economic regulations were as commonly disregarded in Portugal's colonies as in Spain's. Contraband trade flourished exceedingly, beginning on a large scale during the sixty years of Spanish control. The losses that Brazil sustained at the hands of Spain's enemies during this period are estimated to have been far more than made up by the contraband trade carried on by that colony with the English, French, and Dutch. In the time of the Spanish captivity a flourishing commerce developed also between southern Brazil and the Plata region, and Spain found it impossible to prevent this commerce later, despite the establishment of a viceroy at Buenos Aires.

Brazil enjoyed more general prosperity during the colonial era than did the Spanish Indies, chiefly because it had a more healthy economic development than the latter. Not until nearly two hundred years after it was first visited by Portuguese were rich mineral finds made in Brazil; hence there were no gold rushes or mining booms to detract from the more humdrum (and also more economically certain) money-getting activities, such as the extraction of forest products, stock-raising, and farming, which in consequence got a good start.

Exploitation of the gifts of the jungle was the first economic occupation of white men in Brazil; and the Portuguese as well as the interloping French were early interested in it. They first sought only the dyewood known as brazil, which was especially abundant in the north in the region of Pernambuco. From here and farther to the northwest along the coast came also the fustic tree, which was soon sought for its yellow coloring matter. Ship's timber, rosewood and a number of other fine cabinet woods, ginger, and various plants of medicinal value were also important forest commodities of Brazil.

Fishing in the rivers and along the coast was carried on to some extent, but the catch was usually consumed locally and played no important part in the economic life of the colony. With whaling it was different, for the oil was shipped away. At a number of points along the southern coast were small whaling stations, the chief being in the captaincy of Santa Catharina.

This was owned by a company which held a concession from the crown. But whaling was a decidedly minor activity, and it had begun to decline before the end of the colonial era.

Stock-raising and cultivation of the soil kept pace on the whole with the growth of settlement in Brazil, and until the discovery of rich mines these were the leading industries. Land was abundant, and soil not actually occupied by whites could usually be had for the asking or taking. Under the hereditary captaincy system the colonists received generous tracts from the donatories; later, as the territorial rights of the captains were extinguished, grants were made by crown officers directly. But squatting was common, especially out on the sertões, the wild land beyond the settlements; and even when title was held for land the boundaries were often very indefinite, since there was little actual surveying of the tracts. Fences for inclosing estates were unknown, and the size of ranches and plantations remote from cities was generally indicated vaguely as about so many leagues in extent.[1]

The herds ranged freely, regardless of boundaries and land titles; but twice a year there was a general round-up, at which the animals were divided among their owners according to mark or brand, those ready for market were sorted out from the rest, and the young stock were marked. The cattle and horses introduced into the northern captaincies at an early date throve well and brought prosperity to many; but little was done to keep up the quality of the breeds or to improve them, and in consequence there was serious deterioration of both horses and cattle, for the climate was hard upon both. Sheep-raising received but slight attention in the north, and the few sheep found there were coarse of wool. South of Rio de Janeiro (especially in São Paulo and Rio Grande do Sul) the live stock were of better quality, owing to a climate superior to that of the north as well as to more scientific methods employed by the energetic ranchers, some of whom had herds of cattle numbering from fifty thousand to two hundred thousand head.

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[1] Even in the early nineteenth century Henry Koster, an Englishman who spent considerable time in northern Brazil, wrote of the stock-raising region, "Few persons take the trouble of making themselves acquainted with the exact extent of their own property, and perhaps could not discover it if they made the attempt" (*Travels in Brazil*, Vol. I, p. 242).

As in the Spanish lands, the chief value of the cattle at the time lay in their hides, tallow, horns, and hoofs. Only occasionally were the best parts of the carcass salted and dried. Virtually no attention was paid to dairying.

Cultivation of the soil took the lead over ranching at the outset, and in the north it continued to gain in importance at the expense of stock-raising. Just as in the United States, agriculture expanded westward into the interior, with ranching retreating before it. The pioneer planters gave some attention to the cultivation of manioc, yams, potatoes, coconuts, and other native food plants. In both north and south they also raised some tobacco. Rice was grown in the warm, moist lands of the subtropical and tropical coast, especially in Maranhão; but that coming from the region of Santos was considered the best in Brazil. A little indigo was produced in the southern lowlands, and cereals (especially wheat) were raised in considerable quantities in the cooler uplands of São Paulo and Rio Grande do Sul. Coffee, which was introduced in the eighteenth century, long remained a minor product.

The great crops of colonial Brazil were cotton and sugar cane. At least one species of long-stapled cotton was indigenous, and, in different varieties, was cultivated throughout the colony except in the extreme south. By the middle of the eighteenth century cotton was the leading crop of the captaincies of Pernambuco, Ceará, and Maranhão; but in Brazil as a whole cane was more important. The plant was brought in very early, and profitable sugar mills had been set up in the vicinity of Pernambuco before 1530. Not long afterwards Bahia also became the center of thriving cane plantations. By about 1580 the former had fifty mills for manufacturing sugar, and the latter fifty-seven. Ultimately cane was grown with good returns from Parahyba to Santa Catharina. During the seventeenth century Brazil supplied most of the sugar used in Europe, but in the eighteenth century many plantations were deserted by the rush of their owners to the gold and diamond mines. Therefore the

Brazilian sugar output fell greatly, prices rose, and the planters of the French and British West Indies succeeded in capturing from Brazil a rather large share of the European trade.

Though the Portuguese crown, roused by the wealth of Mexico and Peru, long offered various inducements to its subjects for the discovery of precious metals in Brazil, it was not until late in the seventeenth century that gold in important amounts was found. In the sixteen-nineties the Paulistas discovered rich deposits at Sabará, in the territory of the present state of Minas Geràes (General Mines). Other valuable finds were made, about the same time and later, from Bahia to the upper waters of the Madeira River, but those of Minas proved to be the richest. The early reports of big finds of gold brought a mad stampede for the mines, often resulting in the desertion of shops and factories as well as plantations and ranches, to the decided economic hurt of the colony. Mushroom towns, wild and lawless, quickly sprang up—some of them to be abandoned soon afterwards, others to develop into modern cities. In a few years Minas, before practically unpopulated, had a quarter of a million inhabitants.

Quarrels over claims, soon developing into petty civil war, broke out between the Paulistas (who had rather a proprietary attitude toward the mines) and all other comers. Many of the latter were recent arrivals from Portugal and were popular nowhere, but they were especially objectionable to the Paulista discoverers of the rich diggings; in fact, the Paulistas tended to look upon all but themselves as outsiders and enemies as far as working the mines was concerned, and indiscriminately dubbed them *emboabas,* a term coming from the Indian name for the leg armor worn by some of the Portuguese adventurers. After a few years the crown authorities ended the strife, to the disadvantage of the Paulistas; and in 1720, with a view to further curtailing the power of the Paulistas in the interest of peace and order, Minas, which had formed a single province with São Paulo, was given a separate organization. From the mining activities farther to the west were developed the captaincies of Goyaz and Matto Grosso.

The policy of the crown toward the mines was exclusive and followed that adopted long before by Spain. Exploitation of the diggings was limited to Portuguese and Brazilians: all foreigners were banned. A fifth of all gold extracted was demanded by the king, and, in the interest of collecting the whole, smelting mills were promptly set up in the mining districts, with the royal order that all the ore taken out be passed through the smelters, be formed into ingots, and be stamped with the royal arms. But the law was very unpopular and was to a great extent ignored. Most of the precious metal brought from the mines never entered the smelters, but was smuggled out of the country, usually in the form of gold dust. The resentment felt by Brazilians toward the royal fifth, and the fact that it could not be collected effectively, led the crown to make a change in 1733. For the tax on gold was substituted a poll tax upon slaves, who were much in demand in the mining districts. This arrangement met with more favor, but it led to the wasteful exploitation of the mines.

For a time the output of gold from Brazil was very great. By 1749 even the mines of Bahia were producing annually from fifty thousand to a hundred thousand ounces of the metal; and it has been estimated that in the first fifty years Minas Geraes yielded seven and a half million ounces. Toward the middle of the eighteenth century, however, there was a decided falling off, due primarily to the fact that the capitation tax on Negro slaves led the mine operators to work for the maximum of output in the minimum of time; hence they gave attention only to the best-paying placers and lodes of ore. When these were exhausted, a sharp decline in the output began. Though the marquis of Pombal abolished the poll tax in 1751 and restored the royal quinto, the change had no marked effect upon mining. Near the end of the second decade of the nineteenth century only five thousand persons were engaged in taking out gold in Minas, whereas in 1750 there had been about eighty thousand. In most other mining sections there was a corresponding falling off, and the industry experienced no revival during the colonial period.

In their prospecting for gold the Paulistas and others from time to time ran across rather encouraging deposits of tourmalines, amethysts, topazes, and emeralds, especially in Goyaz and Minas Geräes; but more exciting and important was the discovery of diamonds, apparently first made about 1728 at the gold mines of Tijuco in Minas Geräes.[1] Soon Brazil became the leading diamond-producing section of the world, a position it retained until after the Kimberley mines of South Africa were opened up in 1870. In Diamantina, the district where the gems were first mined, five million carats are estimated to have been taken out in the first forty years; but it was very difficult to collect the royal fifth on them, for diamonds were more easily smuggled out than gold. In the interest of guarding against loss the Portuguese crown declared the diamond region its special property, and in 1734 it organized it into the "Intendancy of Diamonds," which was governed by an intendant of the French and Spanish type, directly responsible to the crown. At first the diamond fields were worked through contracts granted by the crown to individuals, but this system was abandoned in 1771 for direct control by royal authorities. As in the case of gold-mining, the period of great activity and prosperity from diamond-hunting was rather brief; for the large supply of gems from Brazil caused the sale price in Europe to drop severely, producing a decline of profits to the miners and a waning of interest in the search for the gems.

In manufacturing Brazil was but little developed in comparison with Spanish America. This may be attributed to distraction caused by the belated finding of gold and diamonds, to the greater ease with which contraband goods from Europe could be secured, and to the lack of advanced aborigines, such as were found in New Spain and Peru, who could easily be made into skilled factory hands. But certain raw materials were worked up on a rather large scale, with but slight handicap from the royal authorities. Cane was milled on the plantations, as in the Spanish Indies, and large quantities of sugar, molasses, and rum were made from it, particularly in the north. Flour mills existed in the cereal-growing areas of the south. Numerous tanneries were found in the larger centers in the cattle-raising parts of the country. Near the close of the colonial era vessels were built at Bahia for the royal navy, and farther south along the coast (especially at São Francisco) there were yards for constructing merchant craft from the gigantic araucaria pine trees of the region. Here and there in the cities were potteries which put out a coarse clay ware, and cabinetmaking shops which produced furniture durable rather than artistic. After the mining era opened, goldsmithing attracted some interest; but the work turned out usually did not have much to commend it.

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[1] The existence of diamonds in Brazil became known by the fact that a wandering priest who had been in the East Indies, where the precious stones were mined, identified as diamonds some gleaming pebbles which the gold-miners of Tijuco were using as counters for their card games.

In addition to the foreign commerce of Brazil already mentioned, considerable local trade in Brazilian products was carried on. Most of it was by water, because practically all the cities were on the coast until the opening up of the interior by mining; but trafficking also went on with the sertões by mule caravan or oxcart. In some sections of the interior, peddlers traveled from village to village or from farm to farm trading products from other sections, or perhaps commodities from Europe, for live stock, hides, and cheese, or other rural surpluses. From the interior, especially from the southwest, came for a long period the ruthless Paulistas with trains of wretched Indians to be sold into slavery in the agricultural sections. Up and down the coast there was some trade in Negro bondmen bred in the land. The south had surplus wheat and flour to ship to the north, and received in return coarse cotton cloth, sugar, molasses, and rum. But cane products were also exported by São Paulo, some of them to neighboring captaincies and some down to the Plata, where woven Brazilian cotton for clothing the humble workmen was also in demand. Before 1820 coffee was being shipped from São Paulo, whose port, Santos, was beginning to be of decided commercial importance as a doorway for the southern part of the colony.

LABOR

Most of the labor in Brazil was done by Indians and Negroes. Though the introduction of slaves from Africa reduced the demand for aborigines to do the work, it was not until 1798 that a royal decree provided for the complete emancipation of the Indians. Very few of them were in slavery at this time, however, whereas Negro bondmen were very numerous. Most of the blacks were supplied by Portuguese traders, who ravaged the coast of Africa; for England met with little success in her efforts to get from Portugal her profitable traffic in human beings. Most of the slaves brought in during the colonial period came from the Guinea coast, though Mozambique and Angola also supplied a good many. They were especially in demand in the plantation sections of the north; and by the close of the seventeenth century the blacks in Bahia outnumbered the whites twenty to one. The opening of the mines brought large numbers into the captaincies farther to the south, particularly Minas Geraes; for slave-owners who rushed off in search of treasure brought their bondmen with them in most cases, and slave-traders sought the mining districts, where unusually high prices were paid, to dispose of their merchandise. In São Paulo and the captaincies farther south few Negro slaves were found until after the close of the colonial era.

Negro slaves perhaps fared better in Brazil than in Spanish America; but the conditions under which they lived were on the whole very similar. Much attention was given to religious instruction and to the marriage of slaves, for which banns were published as in the case of free whites. Slaves might marry free persons. The children took the status of the mother. Masters usually showed strict respect for the marriage relations of their bondmen and coöperated with the priest in working for the development of piety among them. Hence religious brotherhoods of slaves were permitted; and the favorite Virgin of the Negroes, Our Lady of the Rosary, was at times represented in the churches as a black woman. Manumission was encouraged; and public opinion demanded that a slave who acquired the price of his freedom should be permitted by his master to purchase it. In the interest of making the lot of the bondmen easier, public opinion as well as law also required that they be given as their own time all Church holidays, which were about thirty-five in number, as well as Sundays. Many slaves used this leisure to earn money for buying their freedom, and in the cities they often engaged in selling cheap articles of various sorts, which, because of the day, were called by them "God's wares."

That in many cases they were treated cruelly goes without saying. To escape their woes some committed suicide; more ran away, for in the plantation sections the heavy forests were close at hand to supply hiding places. Many thousands of fugitive slaves, consequently, were living in freedom throughout most of the long slaveholding period of Brazil; for very few runaways were found and restored to their owners. To secure protection and companionship, they commonly dwelt in communities strong enough to enable them to make raids on neighboring plantations to secure supplies, which they naturally preferred to planting for themselves. During the prosperous period of Dutch occupation the settlements of escaped bondmen near Pernambuco were especially numerous and populous, and are estimated to have contained as many as thirty thousand blacks.

INTELLECTUAL AND ARTISTIC CULTURE

In intellectual and artistic development Brazil was far behind the Spanish Indies, perhaps because the population of Brazil was more largely rural, as well as because the Portuguese authorities neglected to give proper aid and encouragement in this matter to the transatlantic settlers. Until their expulsion educational work was largely in the hands of the Jesuits; afterwards it was carried on less effectively by other orders. Reference has already been made to the schools of the order established for the Indians in the wilderness. Most of these were elementary; but the Collegio de São Paulo, already referred to, which was intended to train youths for missionary work among the aborigines, was more advanced and gave instruction in Latin, Portuguese, and the Tupí tongue, religion, and other branches. The local officials had seen to it that free elementary schools were established in substantially all the villages and towns by the close of the colonial era in 1822; the religious orders gave more attention to advanced education in the settled parts. The Jesuits founded a number of collegios, including one at Bahia which was noted for the superiority of its work. In the first half of the eighteenth century the seminaries of São José and São Pedro were opened in Rio de Janeiro; their primary object was to train clergy, but they also offered some courses corresponding to those now found in secondary schools, and were open to those merely looking for education beyond the elementary. In the seventeen-seventies the Franciscans, who to some extent replaced the Jesuits, undertook to establish in Rio de Janeiro a university on the model of the venerable one at Coimbra, Portugal; but nothing came of their efforts. When independence dawned Brazil possessed no university and was inadequately supplied with professional schools; but this lack was partly due to the fact that wealthy and ambitious Brazilians had formed the habit of sending their sons to Portugal to study at Coimbra itself. The really serious need of the colony was elementary schools for the rural sections, where the people were grossly ignorant, and where there was usually no provision for teaching them even their A B C's.

Toward the close of the eighteenth century some of the larger cities founded literary organizations and learned societies; but even in the most advanced centers of population little intellectual interest was found. This was natural, however; for not a single printing-press existed in the colony, and consequently local newspapers and periodicals were entirely lacking.[1] The authorities tried to maintain a strict censorship over the books imported, but banned volumes were smuggled in.

In spite of handicaps, colonial Brazil produced a considerable volume of writing, which was printed and published in the mother country. The earliest specimens were apparently those from the pen of José de Anchieta, founder of the collegio of São Paulo, but these were simple hymns and grammars, vocabularies, and other teaching aids. Most of the writings from the sixteenth and seventeenth centuries were plain descriptions of nature and of the aborigines. Probably the best of these was the *Tractado descriptivo do Brasil em 1587*, by Gabriel Soares de Souza, a sugar-planter of Bahía, for it shows much accuracy of description in treating plants, animals, minerals, agricultural activities, and so on. The earliest actual history of Brazil written by a resident was apparently that by Pedro de Magalhães Gandovo entitled *Historia da Provincia de Santa Cruz a que vulgarmente chamamos Brasil*, published in Lisbon in 1576. This is still a source of valuable information. But the best local history by a Brazilian of the colonial era is the *Historia da America Portuguesa*, by Rocha Pitta (1660–1738), who succeeded less well at writing romances and poetry. The products of the pen in the eighteenth century were less informational as a whole and more imaginative; Gongorism and the tendency to make much of little were apparent in the complex and extravagant style of most authors. But in the latter half of the century Brazilian literature somewhat redeemed itself by getting away from the earlier persistent imitation of the great Portuguese poet Luis Camões and showing a spontaneous spirit of Brazilian nationalism. Two outstanding epics illustrative of this type are *Uraguay*, by Basilia da Gama, and *Caramurú*, by Santa Rita Durão. The former deals with the revolt of the Guaraní Indians of the Seven Reductions against the treaty of exchanges made by Spain and Portugal in 1750; the latter is concerned with the patriarchal Diogo Alvares and his return to Europe with his favorite wife, Paragassu, to whom (according to the poem) he is married in Christian style, with Henry II of France and Catherine de' Medici as sponsors. The *Uraguay* is the more original and artistic of the two.

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[1] A press had been set up in Rio de Janeiro about the middle of the eighteenth century, but had very quickly been suppressed by the Portuguese government.

A number of rather talented lyric poets wrote in the same period as Basilia and Durão, the most able of them being Thomé Antonio Gonzaga, called a "modern Petrarch" by one literary historian because of his volume of exalted love poems entitled *Marilia de Dirceu*, which has gone through at least thirty-four printings—more than the writings of any other poet in Portuguese except Camões himself. The poem is described by the leading Brazilian critic Verissimo as "the most noble and perfect idealization of love that we possess." In view of this it is easy to understand why sentimental Brazilians find it hard to forgive Marilia (whose real name was Maria Joaquima Dorothea de Seixas Brandão) for living to be a very old lady after Gonzaga had died in political exile.

The most versatile as well as the most scholarly writer of Brazil born in the colonial epoch was José Bonifacio de Andrada e Silva (1763–1838), who, however, belongs rather to the national period than to the colonial, for he was the father of Brazilian independence. Even his poems, which throb with an intense patriotism, were not published until 1825, after independence had been achieved, and his more serious political writings appeared later.

As to music, drama, and art in Brazil, there is little to say. The same musical instruments as were favored in the Spanish Indies were popular in the Portuguese colony: the piano was the choice of the classes, the guitar was played by the white masses, and the Negroes beat out African melodies upon their primitive marimbas. Orchestras gave occasional concerts in the larger cities, where operas began to be presented at the close of the colonial era, but probably the sacred music played in the churches was superior to either. The humble classes were very fond of dramatic performances based upon Biblical events or the lives of the saints; but these were usually crude in conception and were often grotesque in performance. The plays staged in the theaters patronized by the more prosperous element of the population were very mediocre.

In the larger cities there were some fine churches and attractive dwelling houses; but they were architecturally inferior to those of the Spanish Indies, though they were built in the same general style as the latter except that the Mudéjar glazed tiles were little used and the grouping of domestic structures about courts was less common. Painting and sculpture, largely restricted to the churches, was poor. Brazil produced no artist in the colonial era comparable to dozens who gained fame in the Spanish colonies at the same time.

SOCIETY AND SOCIAL LIFE

In Brazil, as in the American territories under the Spanish flag, whites, aborigines, and Negroes mixed blood freely, but the racial proportions were different, as were the social results. The sections of Brazil most completely settled by Portuguese in the first three centuries had but a thin scattering of aborigines, all of whom were culturally backward and many of whom were exterminated in the fierce wars between them and the early white settlers. Consequently, though blood fusion began early between them and the Portuguese, the resulting mameluke, or hybrid, element was much smaller than in the viceroyalties of New Spain and Peru. Perhaps there was more aboriginal blood among the Paulistas than among any other Brazilians of European culture. On the other hand, Negroes were very numerous in Brazil, especially in the north, and, unlike the Indians, they were in very close association with the whites, so that there was a rapid mingling of blood between the two races. The population dominated by European influence in 1808 totaled some three millions, about one fourth of whom were classed as white and one third as Negro slaves, while the remainder was made up of free Negroes, mulattoes, Indians, mamelukes, and a mixture of Negro and Indian. Doubtless a considerable proportion of those counted as white had African blood.

Colonial Brazil, in fact, represented an unusual degree of racial blending. The strain of Negro blood already in the Portuguese when colonization of the New World began, which tended to lessen racial distinctions, partly explains this; but more influential, perhaps, were the facts that Portugal's population was scant and that Brazil's climate was unusually hard on whites, so that the Portuguese government was unusually dependent upon blacks and aborigines for building up a colonial society, for supplying much-needed labor, and for defending Brazilian territory from its numerous enemies.

Though the Indians and Negroes made up the lowest class in Brazil, and the whitest element the highest, race and color really played only a secondary part in social stratification: the true basis of division was wealth, occupation, and, in the case of the whites, the status of their families in Portugal. Although discriminatory laws existed against those possessing Negro blood, in actual practice little consciousness of race was shown.[1] Even the marriage of high-class whites with Negroes excited little comment unless the latter were very dark. Historians see a tacit recognition by the crown of the potential equality of the two darker races with the white one in the fact that of the four persons decorated and ennobled for services rendered in driving out the Dutch, one was an Indian cacique and another a Negro captain of a black regiment. After these distinctions were given, degrees of nobility were repeatedly conferred upon persons who were known to have Negro blood.

The white element in the population was almost wholly Portuguese in stock; but between the Brazilian creoles and the inhabitants born in Portugal there was an early lack of sympathy that developed into a decided aversion under the influence of such events as the Bekman rebellion in the north and the conflict between Paulistas and Portuguese in the mining districts, both ending with the Portuguese triumphant. Moreover, the greater part of the higher colonial offices went to the Portuguese. The Brazilians consequently felt resentment and jealousy toward the Portuguese, who in turn regarded the Brazilians with the contempt which was considered to be the due of colonials.

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[1] At least until the close of the colonial era those having Negro blood were legally disqualified from becoming priests or holding civil office; yet individuals conspicuously Ethiopian in appearance secured such positions through getting official papers stating them to be white men. "In conversing on one occasion with a man of color who was in my service," wrote Henry Koster early in the nineteenth century, "I asked him if a certain *Capitam-mor* [a local official] was not a mulatto man; he answered, 'he was but is not now.' I begged him to explain, when he added, 'Can a *Capitam-mor* be a mulatto man?'" (*Travels in Brazil*, Vol. II, pp. 209–210)

Though for two centuries most of the settlers who went to Brazil were sturdy agriculturists or Jewish business men who fled to Holland to escape persecution in the mother country and from Holland reached America, there were many undesirables among the earlier and later comers. The pioneer colonists, as will be recalled, were largely riffraff and criminals, and a fair proportion of the Portuguese who rushed to the mines in the eighteenth century were careless adventurers. In general the qualities of the Brazilians were those of their Portuguese ancestors modified by the mixture of race, a large slave element, a very unfavorable climate, and the influence of frontier conditions. The history of some of the provinces, as Robert Southey pointed out, seems "little more than a register of crimes"; in other parts, however, especially in the rural sections, travelers were impressed with the innate kindliness, the hospitality, and the rugged sense of justice displayed by the ignorant and superstitious inhabitants.

In some respects Brazilian society showed a stronger Moorish influence than did that of the Spanish colonies. One instance of this was the greater seclusion of women. Even among the humble rural settlers the women were rarely seen working out of doors, and those of the wealthier and more conservative planter families kept out of sight when men guests were entertained. In the cities they mingled more freely in the society of men, but except when going to Mass those of the upper classes rarely appeared upon the streets unaccompanied by a male relative. As a whole the Brazilian women of the wealthier classes were as given to idleness and laziness as their neighbors under the flag of Spain, and they were more ignorant.

The houses and homes of the Portuguese Americans of the colonial days had a few distinguishing characteristics. Country dwellings, such as those on the *fazendas*, or large estates, were commonly of one story; and close to the "big houses," as in the Spanish colonies, were the huts of the slaves or other laborers, their chapel, and the outbuildings. In the cities buildings of two or three stories were the rule among the wealthy; and in Pernambuco and neighboring sections, probably owing to Dutch influence, narrow brick buildings of as many as five stories were seen. In the hottest sections the roofs projected far beyond the eaves, and windows were often unglazed but were furnished with wooden shutters. Most dwelling houses appear to have lacked inclosed courts, but they usually were surrounded by attractive gardens in which roses, jasmine, and other favorite flowers bloomed the year round. The furnishings of the interiors were simple. Hammocks, adopted from the Indians, were a characteristic feature and were used as beds, sofas, and chairs; pretentious living rooms generally contained a number of gayly colored ones of lacelike quality netted by the women of the family, in addition to sofas and chairs of European style. Mats and cushions placed upon the floor were at times used as seats, and in harmony with this Oriental custom (which lingered longest in rural parts) the dining tables in some homes were but a few inches high.

Out in the agricultural sections the standard foods were meat, commonly dried, and maize or farina variously prepared. In the cities and towns there was greater variety, and among the upper classes formal meals were prolonged through many courses of one or two dishes at a time, made up of vegetables, fish, poultry, and heavier meats, often cooked in olive oil and flavored with garlic. Fruits were a popular food; and even among the poor the meals usually ended with *doces*, or sweetmeats, for the abundance of sugar made these cheap. So popular were doces that they were among the commonest wares peddled on the streets. Fashionable hosts took more pride in them than they did in their wines, and sometimes as many as a dozen kinds appeared at a meal. It was long customary for the host and others at the table to show marked attention to a guest by sending him choice bits of meat and other foods from their personal plates; but by the close of the eighteenth century this had gone out of style among city dwellers, who regarded as plebeian such rural inhabitants as kept up the fashion.

In southern Brazil, where *yerba mate* was grown, it was a favorite refreshing drink. Usually it was taken upon rising or between meals, hot or cold according to which was the more convenient. Men carried with them their equipment for making yerba tea just as they did their provision for a smoke of tobacco.

Dress varied greatly in Brazil according to climate, class, and occupation; only a few types among those found in late colonial days may be mentioned here. In the hot, oppressive section children often went naked up to the age of six or seven, especially boys, who were not expected to be modest. Slaves were clad in plain and meager garments of coarse white cotton. For ordinary purposes men of standing in the cooler south wore a costume made popular by the Paulista bandeirantes, characterized by a broad hat with brim curving away from the face, a large, square woolen mantle or cape, and high, wide-topped boots. In the rough, arid sertão of the northeast, where grew cactus and other spiny plants very destructive to textiles, the men's hats, jackets, and trousers were of leather, and upon their usually sockless feet they wore heavy leather or rawhide sandals. The most characteristic dress of the women of the sertão, who usually kept close at home, was a garment of "wrapper" style and slippers. This appears to have somewhat influenced the garb of men of the section who had reached a state of home-keeping, well-to-do leisure and wished to be considered gentlemen; for they advertised their desired status by wearing dressing gowns and slippers at all hours.

In the large cities wealthy people followed European styles closely, and made much of smart dressing, though there seems not to have been such extravagance in this regard as in Peru and Mexico, where large fortunes were more common. The suits of the men were usually of cotton or of silk. For church attendance the women commonly wore black silk dresses, with a thin scarf, usually of lace, placed over the head and shoulders and more or less covering the face. At unconventional social gatherings they wore gayly colored silks; but for balls and other formal evening functions white dresses were the mode for ladies among the élite, and the proper jewelry was one or more neck chains of pure gold. Tortoise-shell combs and flowers were worn on nearly all occasions. Manners in the best circles were polished and elegant; but, since the population as a whole was ignorant, conversation was more marked by mere exchange of compliments and by gayety and liveliness than by intellectuality. The men usually did most of the talking at social gatherings, for the women were the less well-informed sex, and, because of their seclusion, were inclined to be shy.

The Brazilians were fond of amusement and diversion. These were partly supplied for the humbler classes by baptisms, weddings, and funerals, and by political and religious celebrations. In the early colonial period the festival of the Trinity was very popular, especially among the Negroes, and celebrations in honor of St. John and St. Anthony. They were observed with noisy and often grotesque dramatic representations of events more or less drawn from Biblical narratives. Carnivals, celebrated before Lent, later became popular. During them men and women amused themselves and the onlookers in the balconies by throwing at one another thin wax shells shaped like fruits and flowers and filled with perfumed water, which splashed upon the victims. Dancing was a favorite pastime except in sections of very oppressive climate, where backgammon, cards, or music took its place.

In going about for business or pleasure the Brazilians used the same means of transportation as the Spanish-Americans, the saddle on a horse or a mule being very commonly used in both city and country; but for short distances, especially through city streets, the *cadeira*, a form of sedan chair borne by two slaves, was employed by those who could afford it. Carriages drawn by mules were used where the roads permitted. When trails were rough and travelers wanted an easier method of transportation than the saddle, they went in hammocks swung on poles carried by slaves. Inns and hotels were very few; and in the country, travelers were forced to accept the hospitality offered by private houses, the owners of which frequently looked upon the offer of money as an insult, and felt themselves amply rewarded by news of the Brazilian cities and of the outside world brought by the wayfarer. They gave to him of their best and often regretted his departure.

CHARACTER OF THE CITIES

Cities were generally rather well laid out and were supplied with a number of *praças*, or squares, planted with trees and flowers, around one of which the public buildings were grouped. In the hotter parts of the country, in particular, the streets were narrow, in the interest of reducing the temperature by increasing the proportion of shade, and usually they were unpaved or poorly paved, and dirty. Street lights were not introduced even in the large cities until the end of the eighteenth century. Where pure water was close at hand, as in the case of Rio de Janeiro, it was made available to the masses by being piped to the public squares; but even early in the nineteenth century the water supply of Pernambuco had to be brought to the city from a considerable distance in canoes. City police were lacking, and masked bands at times prowled at night to prey upon respectable people whom they found upon the streets. Obstruction of traffic, and occasional accidents, were caused by the facts that even in the rather proud city of Rio de Janeiro the doors of shops and private houses opened outward and that horsemen rode upon the narrow sidewalks.

Rio de Janeiro, which had been made the capital of Brazil in 1763, had grown very rapidly as a result of the development of the mines, for which it was the commercial gateway; and by about 1820 it was the largest city, with a population of about one hundred thousand. Bahia, the former capital, was next in size, with about seventy thousand inhabitants; Pernambuco had about twenty-five thousand, and São Paulo had between fifteen and twenty thousand.

XII

THE RISE AND FALL OF SAINT-DOMINGUE

Men are born and remain free and equal in rights. Social distinctions may be founded only upon the general good.—*Declaration of the Rights of Man*

MODERN Haiti had its remote beginnings in a piratical settlement made by French and English about the year 1625 upon the little island of Tortuga lying near the northwest coast of Hispaniola. Before long the adventurers gained a foothold on the unoccupied western end of the larger island, and shortly afterwards the French drove out the English. They were aided by the governor of St. Kitts, at the time controlled by France. The victors continued their piratical activities in a desultory way; but they also occupied themselves with agriculture and with hunting wild cattle for their hides and hogs for their flesh, both of which they sold to passing boats. The colony prospered and maintained itself in spite of the efforts of Spain to wipe it out. This led Louis XIV to look upon it with a proprietary eye; and in 1664 it was placed under control of the French West India Company, with Bertrand d'Ogeron, a retired pirate, as its governor.

D'Ogeron took an interest in his new occupation and worked for the stability and progress of his care-free, riotous colony. He encouraged agriculture, and had respectable French girls of humble birth sent out to become the wives of the men. Under the new stimulus the settlement grew and a number of small towns were started, among them Cap Français (now Cap Haitien), laid out in 1670. In the agreement made by the European powers by the Treaty of Ryswick in 1697 Spain recognized France's title to the portion of Hispaniola settled by the French —and called by them Saint-Domingue—lying to the west of a line running southward from a point a little to the east of Cap Français. Now began a new era for the colony.

A definite colonial organization on the model of that in New France was given to it, headed by a governor-general, who was the military commander and leading royal authority, and an intendant, the chief financial and judicial officer. These two were members of the colonial council, which, under instruction of the king, managed the affairs of the colony. Each of the three provinces of the colony also had a governor and council, but these were responsible to the general council, as were the royal officials who were placed in charge of the towns. There was no element of self-government in Saint-Domingue: almost all questions were settled directly or indirectly by the two chief royal officials, who at times came into conflict with reference to their respective powers.

One of the functions of the governor-general was the supervision of the Roman clergy authorized to work in the colony. The Capuchin order was assigned to the northern province, which included Tortuga and the adjoining coast of the neighboring peninsula, and the Dominicans were given the western province, taking the coast of the great bight from Cap St. Nicolas to Cap Tiburon, and the southern province, extending eastward from Cap Tiburon. Later came members of other orders, including the Jesuits.

Under its new organization the colony made rapid progress. Within half a century after the arrival of the first governor-general in 1700 a number of important towns were founded, including Port-au-Prince, which was laid out in 1749. In 1770 it supplanted Cap Français as the seat of government.

Agriculture expanded until almost all the fertile land even to the tops of the hills was covered with flourishing plantations. At first the chief crops were indigo and sugar. In 1720 twelve hundred thousand pounds of the one were produced and nearly twenty-two and a half million pounds of the other. A little later cotton and coffee began to be planted on a large scale, the latter upon the cooler mountain slopes, where it flourished well. Bananas, yams, manioc, cacao, and coconuts also were introduced and flourished. A census of 1754 showed a marked increase in the leading agricultural crops and also reported sixty-three thousand horses in the colony and ninety-three thousand cattle. In 1789 even the exports of Saint-Domingue sent out under the restrictive commercial system of France amounted to 175,000,000 francs, or about $32,000,000. In addition, large quantities of products were smuggled out, especially to the United States.

Unfortunately this great economic prosperity was accompanied by an ominous social situation. The foundations of this had been laid, even before the Treaty of Ryswick, by the introduction of various elements into the population. The women first brought to the colony by d'Ogeron had been followed by others, many of them of low character, taken from the streets of Paris. Moreover, Negro slavery had been introduced and had expanded rapidly. The mixing of blood between white men and black women began at once, and continued in spite of the efforts of Louis XIV to discourage it by decreeing freedom for both the mother and her half-breed child. The chief result of the decree was the rise of a free mulatto class which, under a code of laws drawn up in 1685, had the same rights as the white inhabitants. However, resentment soon began to develop toward these freedmen (*affranchis*), or colored people (*gens de couleur*), as they were called, and expressed itself in propaganda against Negro blood in general and the mulatto element of Saint-Domingue in particular. Its aim was to prove that the black man was inherently inferior to the white and but little above the brute in intelligence and character, and that hence it was not well to permit the freedmen legal equality with the pure Caucasian element in the population.[1] One result of this was the passage from time to time of harassing discriminatory legislation against the mulattoes. By 1789 they were prohibited from dressing like the whites, from wearing jewels, from riding in carriages, from traveling in France, from practicing any of the professions, from serving in the militia, and from filling any public office. In addition, the penalty was more severe against a freedman who injured a white man than in the reverse case. Actually, the laws were not strictly enforced, but this fact did not prevent the growth of deep hatred and animosity on the part of the mulattoes toward the dominant whites, and this increased resentment on the other side. By the time the French Revolution broke out a bitter schism existed between the two racial groups.

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[1] According to a contemporary writer quoted by Herbert E. Mills (*The Early Years of the French Revolution in San Domingo*, pp. 17–19), prejudice against the mulattoes originated from jealousy felt by the white women for the colored ones because the latter seemed to be preferred by the white men. Hence the white women began to stir up feeling against their rivals on the basis of the Negro blood of the latter. Nevertheless, according to the census of 1774, in that year five thousand out of the seven thousand free colored women were mistresses of white men.

Furthermore, all was not well within the creole group of the population, which fell into two rather sharply divided classes: *grands blancs* and *petits blancs* (big whites and little whites). The one was made up of various higher officials, outstanding members of the professions, and great merchants and planters; the other, of petty functionaries, shopkeepers, mechanics, small planters, and employees on the large plantations. In general, the grands blancs were the descendants of early settlers who had gained position and wealth and, in some cases, titles of nobility; the petits blancs were from the more recent arrivals. Between these two classes there was ill will; for the humble creoles felt jealousy and irritation toward the wealthy ones, who looked upon them with haughty disdain. Both white groups, and also the mulattoes, generally regarded the dominant French officers with resentment.

Supporting the social superstructure of whites and mixed-bloods were great numbers of slaves, a large fraction of them born in Africa; for after 1750 there was an increase in importation, and an average of thirty thousand were brought in annually. The *code noir* of 1685 placed many restrictions on the bondmen, but on the whole it was intended to provide for their fair treatment, and definitely stipulated that they should be taught the Roman Catholic faith and be excused from work on Sundays and religious holidays. The last of these regulations was, generally speaking, fairly well observed; and efforts were made to Christianize the blacks, but it was not an easy task because of their great numbers and the constant and increasing accessions from Africa. Furthermore, the clergy were corrupt and vicious and had little real understanding of the principles of Christianity. Consequently their efforts perhaps had slight effect upon the lives of their charges, who added to their original vices new ones characterizing bondmen everywhere.

In fact, the population as a whole was corrupt, as was to be expected in view of the character of the original settlers, whose descendants were further demoralized by the possession of great wealth and abundant leisure in a morally vitiating tropical climate. There was a general lack of fine qualities. Though the planters were hospitable and gave generously to charities from their easy wealth, they and the remainder of the inhabitants were notably lacking in real pity and altruism. A sense of honor and of justice, too, was absent in the colony, and unscrupulousness of conduct in itself met with little criticism. Sex morals were conspicuously bad, but visitors were more struck by the general want of self-control, which was the cause of most crimes committed by the inhabitants. Even planters proud of their social status as well as of their wealth were guilty of wild bursts of passion, and in their thirst for revenge displayed intense cruelty. The helpless slaves were the most common victims of such displays of weakness. In their treatment of the slaves the white women were reputed to be more imperious and tyrannical than the men.

Such was the moral and psychological condition of Saint-Domingue in 1789. By then it had a population of from thirty to forty thousand each of whites and freedmen and half a million or more of slaves, and to the eye it was a charming and prosperous land. Its title "Queen of the Antilles" was well merited, for it was the leading tropical colony of the world. Its natural beauty was enhanced by the many thousands of flourishing plantations of cotton, coffee, indigo, and sugar, each with comfortable dwellings and thick division hedges of citron, the well-made roads shaded with lime trees,[1] and the several modern cities with imposing public buildings and artistic parks and fountains. The colony, says a writer of the time, was "like the verdant bosom of a volcano, unconscious of the flame about to burst." Yet there was great danger from internal combustion, with the schisms and antagonisms of the free population and with a slave population outnumbering the free almost ten to one. However, the torch that was applied to the well-laid fuel came from the outside in the form of the political doctrines of the French Revolution.

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[1] The roads were built under the corvee system, which also existed in France at that time; the work was done by gangs of slaves furnished by the planters.

As soon as the rich planters of Saint-Domingue heard that the French Estates General was to meet in an effort to solve the economic problems of Louis XVI, in defiance of the governor-general of the colony they proceeded to choose delegates to the gathering. Six of these were finally given seats in the French National Assembly. In this body, as in Paris as a whole, the slaveholders from the Caribbean colony found a growing emancipation sentiment, fostered by the *Amis des Noirs*, an abolition society to which Mirabeau, Robespierre, Lafayette, and other revolutionary leaders belonged. The *Declaration of the Rights of Man*, which was proclaimed in August, 1789, was doing its work; and the Amis not only vigorously circulated protests and petitions in Paris in the interest of freeing the Negroes, but a few made their way to Saint-Domingue and were so indiscreet as even to urge abolition in the presence of the slaves themselves. This increasing attack upon what they regarded as their chief source of wealth led the Dominican delegates in Paris, in coöperation with some of their fellow creoles who happened to be there at the time, to try to preserve slavery by securing local autonomy for Saint-Domingue: the colony was to be under the crown but independent of the National Assembly. But the plan they devised did not admit the mulattoes to any of the new rights coming from the French Revolution. This continued discrimination was partly the result of old prejudice; but it was also based on the fear that if the manhood of the Negro was recognized by giving equal rights to the mulatto the slave would become more averse to his bondage and the danger of servile risings (of which there was constant dread) would be much increased.

Meanwhile the Dominican mulattoes were not unaware of the new ideas regarding the rights of man and of the events that had taken place with the object of securing some of these rights for white Frenchmen; hence they asked recognition by the National Assembly, but were refused. In Saint-Domingue, however, freedmen were admitted to the primary assemblies called in the provinces; but when the planter element working in Paris for exclusive rights learned of the concession made to the colored people they launched a vigorous propaganda against them by letter, which resulted in the expulsion of the freedmen from the primary assemblies and increased racial bitterness. When a constitutional convention for the colony met at St.-Marc in the western province under authority of the National Assembly, only whites were admitted as delegates. In its proceedings the gathering so ignored the French authorities as to rouse suspicion that the powerful planters working in it aimed at independence. Most of the delegates, however, were merely bent upon securing for the colony the right to control its internal affairs, and the plan of government that it proceeded to draft so provided; but, through fear of local trouble or by inspiration gained from the National Assembly, the gathering was moved to favor reforms for the mulattoes and a revision of the slave laws. Its actions were more or less opposed by the provincial assemblies and parish meetings which took place to discuss political changes; they also met with definite opposition from the governor-general. In the quarrel between the governor-general and the assembly at St.-Marc, the petits blancs, who had felt themselves ignored by the wealthy creoles, sided with the former. Soon the local convention was dissolved by the National Assembly, and its acts were declared null and void.

Before its dissolution a revolt had taken place among the disaffected mulattoes, who had received some sympathy from a few petits blancs.[1] The leader of the movement was Vincent Ogé, a colored man who had recently been a student in Paris, where he had come under the influence of the Amis des Noirs and had been urged by Robespierre in particular, it would seem, to start a conspiracy in favor of aiding both mulattoes and slaves. The uprising was quickly quashed, however, and Ogé was put to death with ferocious cruelty.

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[1] One of these, an old magistrate named Ferrand de Beaudierre, who drew up a memorial in behalf of the mulattoes, was put to death by the mob.

The insurrection of the freedmen, combined with the insubordinate action of the assembly at St.-Marc, helped to bring about in France a reaction favorable to the former. Consequently in May, 1791, the National Assembly passed a decree giving to Dominican colored people born of free parents the right to sit in parish meetings and in the colonial general assemblies on the same terms as whites. Only a few hundred people of the mulatto class came under the new act; but the white leaders of Saint-Domingue prepared to resist it, and the governor-general, fearful of consequences if he opposed them, failed to uphold the law. In the summer of 1791 the mulattoes, feeling that they had been betrayed, again revolted, and allied themselves with the slaves, who were already very restless under the propaganda that had been carried on in their favor and soon began to turn against their masters. Before the servile insurrection actually developed, the French government, more alarmed by the whites of Saint-Domingue than by the colored people, reversed its earlier action and gave the colonial assembly full right to determine the status of mulattoes and slaves.

After the racial warfare had continued for some time, the weak and harassed National Assembly again shifted its attitude and gave to all free people of Negro blood in the French West Indies the same political rights as the whites had. But the concession came too late: the struggle for colored dominance was getting well under way, for slaves were turning against their masters in alarming numbers. To make the situation more hopeless, the leading creoles, who regarded the recent action of the French government as a knell of death, gave no sign of yielding to it. The two races fought with the ferocity of wild beasts, and frightful atrocities took place on both sides. The handsome homes and thriving plantations were burned, and the beautiful tropical land was laid waste. As the tide of war turned more and more against the whites most of the survivors among them fled from the colony, many going for refuge to the Spanish part of the island and to other sections of the West Indies.

Gradually many of the colored leaders were supplanted by the more numerous blacks, freed by self-action or by the proclamations of the mulatto military leaders. The ablest of the recently freed Negroes was one Toussaint, soon known as Toussaint L'Ouverture, who was about fifty years old when the revolution began in Saint-Domingue. When he was a herder on a large estate directed by a man named Bayon Libertat, Toussaint somehow learned to read, write, and figure, an achievement which so pleased Libertat that he promoted the slave to the position of postilion, or coachman. This gave the slave more opportunity for reading and study, which he carried on to some extent upon the advice of a friendly priest, who introduced him to the philosophical history of Abbé Raynal, one of the forerunners of the French Revolution. Military history especially attracted him, however, and he read with interest accounts of the careers of Julius Cæsar and Alexander the Great. He was also fond of the writings of Epictetus, which he read in French translation, and was apparently stimulated by them toward the development of a high character. Toussaint, who had much military and political ability, joined and aided in the uprising of the slaves late in 1791. At first he was on the royalist side and against the French Republic, but later he changed his views and soon began to work for the independence of Saint-Domingue. As the racial war grew in intensity and the danger to the whites increased, Toussaint helped Libertat, his former master, to get away to Baltimore, Maryland, and after his arrival there repeatedly sent him aid of various sorts. When he had conquered the western part of the island, Toussaint carried the war into the eastern part,[1] which had been ceded by Spain to France in 1795; and by January, 1801, he had captured the capital, Santo Domingo, and was in control of the whole island. In the largest square of the city he proclaimed the

[1] By this time the name "Hispaniola" had been abandoned and Santo Domingo, the name of the capital of the Spanish portion of the island, had been applied to the whole.

liberation of the slaves throughout the country. Then, still maintaining military rule, he set about replacing the frightful confusion by some sort of order. The island was divided into four districts and placed under army officers, whose duty it was to supervise forced agricultural labor[1] as well as to maintain order and attend to the general administration of the territory. Idleness and vagabondage were punished without mercy. A general assembly was called which drew up (partly on the advice of a friendly Frenchman named Pascal) a constitution giving the island local autonomy with a governor-general elected for life with the right to name his successor. Toussaint, who was given the office, appears to have had some hope that these political arrangements would be acceptable to the French government, which at this time was the Consulate. After passing considerable general legislation the assembly dissolved itself, and Toussaint was in complete charge.

The new governor-general, perhaps because he felt distrustful of others, attempted to watch all activities of the population through riding almost continuously from one part of the island to another and ordering harsh punishment of those found delinquent in any way. This policy produced ominous resentment.

Meanwhile Napoleon Bonaparte, First Consul of France, to whom the dispossessed Dominican whites had made appeal, had no thought of permitting the country's prize colony to remain in practical independence. Extensive preparations were made for regaining control of Saint-Domingue. In January, 1802, a large fleet arrived in charge of Leclerc, Napoleon's brother-in-law, who had been appointed captain-general of the island. Fearful of the consequences of French control, the inhabitants as a whole rallied around Toussaint in the defense of their liberty; but within a few months the armies of Leclerc held most of the territory. Toussaint therefore decided to negotiate with the French commander, and, being promised by him perfect safety and the right to retire to one of his plantations, he surrendered and withdrew to one of his estates. Leclerc, however, was under secret orders from Napoleon to reëstablish slavery and to send the leading officers of the Dominican revolution to France. The fact that blacks continued to ravage the country after Toussaint had retired from the conflict caused the French commander to suspect him of inciting the disorder. Therefore he decided to include the black governor-general within his orders. By means of a ruse Toussaint was made prisoner in June, 1802, and sent to France, where he died the following year.

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[1] In order to secure food for the population and to begin the economic restoration of the land it was decreed that the blacks should work for five years upon the estates of their former masters.

Leclerc's position did not grow easier, however, for his soldiers had been attacked by yellow fever and were dying by hundreds. Furthermore, in the proclamations issued while Toussaint was leading the resistance Leclerc had repeatedly assured the blacks of their freedom from bondage; hence, despite the clamors for the restoration of slavery from the few whites who had remained in the island and from those who had returned, he decided not to begin the reënslavement of the blacks until he had secured military reënforcements. While he was waiting for additional aid, word reached the black leaders of Saint-Domingue that slavery had been restored in the French colony of Guadeloupe, where the blacks had likewise revolted. These tidings caused the Negro Dominicans again to take up arms on a large scale. Before French reënforcements arrived Leclerc was dead of the fever; and his successor continued, with a new army, the vain struggle against disease and against hundreds of thousands of ex-slaves determined to preserve their liberty. In view of the rather hopeless situation in Saint-Domingue and threats from the British fleet, Napoleon withdrew his army from the island late in 1803 and left it to the blacks, whose commander in chief was now the ex-slave Jean Jacques Dessalines.

On January 1, 1804, the leaders of the army issued a statement declaring the land free, under the aboriginal name Haiti. Following the precedent established under Toussaint L'Ouverture, "in the name of the people whom he had made happy," they proclaimed Dessalines governor-general for life with dictatorial powers and the right to name his successor.

XIII

THE WARS FOR HISPANIC-AMERICAN INDEPENDENCE

> There can be no revolution until the ideas of men become the conscience of the mass, and until the passions of men become a living force, because "it is man and not events which constitute the world."
>
> BARTOLOMÉ MITRE, *The Emancipation of South America*, p. 15

BY THE time Haitian independence had been proclaimed the foundations were fairly well laid for revolts in Hispanic America against the mother countries. In the three centuries of the colonial era uprisings had repeatedly taken place; but these had usually been caused by some local grievance,—such as the oppressions of the corregidor in Peru, which provoked the rebellion of Tupac Amaru,—were restricted in extent, and often were effective in bringing about reform.[1]

CAUSES FOR DISAFFECTION IN SPAIN'S COLONIES

General causes for disaffection toward Spain were never really lacking in the Indies; but it was not until rather late in the colonial period that the class most concerned was strong enough for effective action, and only after the first decade of the nineteenth century had ended was a stimulus supplied for raising the banner of independence in the Spanish colonies as a whole. When this came, long-standing grievances loomed large.

The most serious basic reason for estrangement of the colonies from the crown was the narrow and selfish economic system already described; for the reforms made by Charles III came too late and were too limited to reconcile the disaffected element in the population. Furthermore, the illegal trade which reached such gigantic proportions in the eighteenth century, for the reason that the mother country was unable to produce sufficient to supply colonial needs or to compete with energetic foreign rivals, tended to open the eyes of the colonists to Spain's relative position among the nations.

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[1] This is illustrated by the fact that a revolt in 1733 against the monopoly of the Caracas Company of Venezuela resulted in a termination of the monopoly, and that armed protests against taxes in Peru secured more political power for the creoles.

By the time this awakening came a social revolution had taken place in the Indies: the creole element had become numerically predominant in the population. By reason of birth and rearing in a frontier environment the white colonials were more mentally receptive and less conservative than the Spaniards, from whom they were alienated because of the preference of the crown for the latter, especially as regarded appointment to office. Furthermore, the wealth of the creoles had permitted a fair proportion of them to secure at home or in Europe a good education, and this gave them a share in the progressive thought of the time and caused them to resent the meddling of the Church and of lay authorities with intellectual freedom, as well as the economic discriminations by which they were constantly harassed. Toward the end of the eighteenth century, in recognition of the differences in point of view that had come to separate them from the peninsulares, the creoles had begun to call themselves *Americanos*.

The sparks of this intellectual rebellion were powerfully fanned by the writings of the English and French philosophers, which, as has been stated, were smuggled into the colonies and secretly circulated there among eager young creoles.

More stimulating were the tidings that the thirteen English colonies had converted philosophical precept into tempting example by revolting against the autocratic policy of their king and declaring their independence. Still more influential was the fact that Spain, unequally yoked to France by the Family Compact, was drawn into the war made upon England with the object of freeing that country's most prized colonies. The Argentine historian Bartolomé Mitre puts the case rather too strongly in saying that by this act Spain virtually abdicated its authority in the New World; nevertheless the move certainly had disastrous potentialities for Spanish control over the Indies. This was realized by the count of Aranda, who was Spanish ambassador to France during the revolution of England's colonies. In a paper presented to Charles III he referred to the independence of these colonies as "a subject of grief and fear." Now, he declared, Spain stood "exposed to terrible reverses."

In an effort to prevent these reverses, Aranda is said to have drawn up a plan to prevent the Spanish Indies from acting on the unlucky hint offered by the mother country through helping to transform England's colonies into an independent republic. Aranda's aim was to hold the Indies in a firmer administrative grip. Therefore, according to the plan attributed to him, he proposed that Cuba, Porto Rico, and a part of the neighboring South American mainland be ruled directly by the crown, and that the remainder of the colonies be apportioned among three Spanish princes who were to have the title of "king" over the territory ruled but must marry Spanish princesses and must fully recognize the imperial authority of the Spanish sovereign. Charles III paid no attention to the suggestion, partly because it was accompanied by special trade advantages for France. About twenty years later the Spanish minister Godoy made a plan of the same general character for colonial control, but without commercial provisions or a delegation of royal authority to local rulers in the Indies. However, Charles IV failed to put the plan into effect, and thus was lost Spain's last opportunity to save her colonies and to be in the twentieth century a rival of England in over-sea dominions.

Even before Godoy's plan was set forth came the French Revolution, which proved to be the beginning of the end of Spain's colonial empire. This tremendous explosion had greater direct influence in bringing about a break with the mother country than had the American Revolution. Alert young creoles, whose minds had been prepared by the works of Montesquieu, Voltaire, and other French philosophers, promptly accepted the doctrines of the French revolutionists and proceeded to spread them in the interest of independence. One of the boldest of these firebrands was Antonio Nariño, a native of Bogotá, who secured a copy of the *Declaration of the Rights of Man*, translated it into Spanish, and in 1794 printed it on his own press. Through his distribution of copies among friends he was found out and sentenced to ten years' imprisonment in Africa; but he escaped, and during a short period of liberty plotted in England and France to convert New Granada into a republic. In 1797, when he was again in Bogotá, his life was in danger, and he expressed to the viceroy a penitence for his treason which he probably did not feel. Nevertheless, to guard against further mischief from Nariño the crown ordered that he be kept in prison until the conclusion of peace by Spain in the war of the French Revolution.

The real forerunner of Spanish-American independence was not Antonio Nariño, however, but Francisco Miranda, a native of Caracas, who began his revolutionary activities earlier and remained longer in the struggle. Miranda, who was half adventurer and half idealist, possessed of only mediocre ability but of much self-confidence and persistence, appears to have been first fired with a desire to free the Indies from the mother country when he was fighting under the Spanish flag for the independence of England's thirteen colonies. For the remainder of his life this ambition was the mainspring of his actions. Most of his subsequent years were spent in Europe, where he flitted from one court to another, occasionally rousing suspicion by his strange actions, or lived in London or Paris, making his home a rendezvous for disaffected Spanish-Americans. By means of letters and incendiary literature sent to leaders in the Indies he strove to incite risings against Spain. In 1810 he was instrumental in founding in London a revolutionary journal called *El Colombiano*, to be published for distribution in Spanish America.

Before this he had sought from the British and United States governments definite aid in the furtherance of his plan to overthrow Spain's dominion in America; but his efforts were vain. The United States was still too feeble to risk the possible consequences of acquiescence; and though for a time the English government planned to respond favorably, it was prevented from doing so by Napoleon's invasion of the Iberian Peninsula in 1807, which virtually forced an alliance between Spain and England against the Corsican upstart.

In seeking private aid Miranda met with some success in the United States and was able to secure a boat, considerable military supplies, and about a hundred recruits. In the *Leander* the filibustering expedition sailed from New York in February, 1806, was augmented by a few other small craft in the West Indies, and captured Coro, on the coast of Venezuela, where Miranda proclaimed the revolution; but the people of the back country failed to rally to his standard, and he was forced to withdraw.

Two years after these futile efforts, events occurred in Europe which had a dynamic effect on the situation in the Indies. Napoleon undertook to conquer Spain. He forced the weak, stupid old Charles IV and his equally weak and inefficient son Ferdinand to resign their crowns, imprisoned the latter, and placed his brother Joseph upon the throne. By this action the ambitious Corsican laid the foundation of his own undoing, for he had not reckoned on the intense local patriotism which had developed in the Spanish people during their long struggle against the Moors. Their resentment was now stirred to a furious pitch. It was necessary for Napoleon to keep a large army in Spain in order to maintain his usurping brother on his wabbly throne, and he utterly failed in his efforts to conquer the nation as a whole. Here and there over the country indignant Spaniards quickly organized centers of resistance in the form of *juntas*, or local councils. These denounced both the Bonapartes, swore allegiance to Ferdinand VII, and assumed governmental functions. At Seville a central junta developed which acted as a council of regency for the imprisoned Ferdinand.

Napoleon sent agents to the New World to notify colonial officers that his brother Joseph was "king of Spain and the Indies" and to require oaths of support to the new order of affairs; but close on the heels of the Napoleonic commissioners came envoys from the patriotic juntas assuring the colonists that they recognized as sovereign of Spain not Joseph but Ferdinand. Encouraged by this, the population of the Indies repudiated the

French emperor and his puppet brother, and the majority apparently gave honest allegiance to Ferdinand, who was formally proclaimed in several colonial capitals. Juntas after the Spanish models were formed in the Indies to meet the crisis. In some cases these were the city cabildos with new functions; in others they were committees appointed by the cabildos. In some cities mass meetings were called to consider the situation and to help in the work of restoring the wretched Ferdinand, whom some regarded as a martyr and therefore idealized.

Meanwhile it was apparent that there was in the patriotic Spanish groups the will to place the Indies on a better basis. In January, 1809, the central junta meeting at Seville declared the colonies to be integral parts of the kingdom instead of mere appendages of the crown; and late the next year an invitation came to the Indies to elect delegates to the Cortes which the recently appointed committee of regency had called to meet in Cádiz.

Some representatives were ultimately sent from Spanish America to the radical Cádiz gathering; but the colonists as a whole seem to have paid little attention to its acts, for the Indies were seething with daring plans which were being executed here and there. As a matter of fact, the placing of a usurper on the Spanish throne made the ties binding the oversea territory to the mother country at once very tenuous; for the colonists regarded themselves, and rightly, as owing loyalty not to the Spanish nation but solely to the legitimate sovereign of the kingdom. Despite the enthusiasm expressed in many parts of the Indies for Ferdinand, the thinking part of the population fully realized that he might not be restored to the throne of Spain and that foreign domination of the country might continue indefinitely. To submit to alien rule was unthinkable to the creole element; the alternative was independence,—an alternative which some at the outset of the Napoleonic usurpation preferred even to having Ferdinand for king. Others, in increasing numbers, came to take the same attitude owing to the fact that the colonies were left largely to their own resources during the six years when Napoleon's armies were battling for the conquest of Spain. Moreover, with the legitimate king swept aside and the colonial officials increasingly irresponsible, the walls shutting the Indies from the outside world were thrown down and new ideas of liberty flooded in, moving the inhabitants to bold deeds.

Additional printing-presses were brought in, revolutionary publications were started, radical societies were organized, and before the close of 1810 various uprisings in behalf of independence had taken place. Two of the most noted of the periodicals founded as a result of the new burst of interest in broader human rights and political independence were those of the neglected colonies of the south temperate zone: the *Gaceta de Buenos Aires* and the *Aurora de Chile*. Mariano Moreno, a cultured lawyer and one of the leading revolutionists of Buenos Aires, was the chief founder and the editor of the *Gaceta*, which was started in 1810; but its most prominent contributor was Bernardo Monteagudo, who later started two other newspapers, both short-lived, as was the *Gaceta*. The vigorous revolutionary utterances of Monteagudo became well known through his journalistic work, and they did their part in spreading separatist sentiment. He might properly be called the Thomas Paine of the movement for Spanish-American independence. "It would be an insult to the American people," he wrote, "to admit the necessity of proving that we ought to be independent." "We are free because we desire and are able to be free; it is the order of nature, and yet we are treated as rebels."[1] The *Aurora* was printed on the first press set up in Chile; the press was brought to Santiago from the United States in 1811, together with three printers to operate it. The first issue of the paper appeared in February of the next year amidst much rejoicing that this "so long-desired means of eliminating ignorance was at last secured." The editor was the friar Camilo Henríquez, whose revolutionary doctrines roused the enmity of the pro-Ferdinand provisional government of Chile. Nevertheless incendiary writing from the pen of Henríquez appeared in the *Aurora* during its fourteen months' existence and continued in the *Monitor Araucano*, which took its place.

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[1] Bernard Moses, *The Intellectual Background of the Revolution in South America* (1810–1824), p. 91.

Because of the irregular situation in Spain the utterances of the press served as a two-edged sword. Statements in favor of independence, although ostensibly meaning independence from Napoleonic domination, could also strike at Ferdinand and were often intended to do so; and thus the readers were educated to the idea of complete governmental freedom.

RESISTANCE IN NORTHERN SOUTH AMERICA

Political actions in harmony with such views began to occur here and there. Apparently the first actual move for independence from the Spanish crown came from Venezuela (then known as the captaincy-general of Caracas), where Francisco Miranda had busily sown seeds of discontent with the old order. On April 19, 1810, an extraordinary cabildo in Caracas formed itself into a supreme junta, and compelled the captain-general, Emparán (who was said to favor Napoleon), to resign.[1] Soon afterwards it expelled Emparán and various other royal officers from the colony and proceeded to govern in the name of the imprisoned Ferdinand, who was, of course, merely a name. Substantially all the provinces recognized it as the central authority and sent deputies to Caracas to participate in administration. The junta also communicated with the cabildos of other capitals in South America, urging them to follow its example and set up revolutionary governments in the name of Ferdinand; it provided for the command and payment of the local troops; and it passed decrees which prohibited the collection of tribute from the aborigines and of sales taxes on necessities, as well as the importation of slaves.

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[1] The story is that, after the junta had been formed and Emparán had been recognized by some of the members as its president, he stepped out upon the balcony to appeal for support and confidence to the people gathered in the street below. He was closely followed by Canon Madariaga, present as a representative of the clergy, who, standing behind the captain-general, made signs to the crowd what reply they should make. Accordingly the people called out "We do not desire it" (*No lo queremos*), and Emparán felt it politic to respond, "Neither do I desire to control" (*Yo tampoco quiero mando*). Those who did not wish him to continue in office interpreted these words as a resignation, and Emparán's rule in Venezuela ended. (Felipe Tejera, *Manual de Historia de Venezuela*, pp. 26–27.)

Unfortunately for the slender ties still connecting Venezuela with the crown, when the committee of the regency at Cádiz heard of these events it declared the colony in a state of rebellion and proclaimed a blockade of its ports. Word of this reached Caracas about the same time as tidings that the leaders of a similar revolutionary government set up in Quito in the name of Ferdinand had, on August 2, 1810, met with bloody death at the hands of the Spanish authorities. Hence the central junta of Venezuela threw aside all pretense of loyalty to the legitimate sovereign and began to work boldly for independence. Through commissioners whom it sent to England to ask aid and recognition, Francisco Miranda, then living in London, learned of recent happenings. He promptly returned to Venezuela, arriving in December, 1810, and was given a command in the revolutionary army. As a delegate to the congress of the "American Confederation of Venezuela," which assembled the following March, he did a great deal toward nerving the members for decisive action.

A declaration of independence was prepared by a committee appointed by the gathering, was signed by the congressmen on July 5, 1811, and was formally adopted two days later. The language of the document shows plainly the influence of the pronouncement drawn up thirty-five years before by England's revolted colonies, but it dealt specifically with Venezuelan grievances. A point was made of the incongruity of letting such an extensive and populous region as the Indies be subjected to and dependent upon "a peninsular corner of the European continent." The declaration (in its own language) passed over in a "generous silence" the wrongs done to the early discoverers, conquerors, and settlers, and threw "a veil over three centuries of Spanish dominion in America." It then proceeded to mention in detail grievances caused by recent events, notably the abdications of Charles IV and Ferdinand, whose conduct made them "unfit to rule over a free people, whom they disposed of like a gang of slaves"; the accession of a new dynasty established without colonial consent; and particularly the hostile actions of the committee of regency at Cádiz, which were denounced with much bitterness. In conclusion it solemnly declared that "these united provinces are, and ought to be, from this day forth, in fact and of right, free, sovereign, and independent states; that they are absolved from all allegiance to, and dependence on, the crown of Spain and those who now, or may hereafter, call themselves its representatives or agents." The delegates pledged themselves to labor for the fulfillment and the validity of the declaration.

In the following December the Venezuelan congress adopted a federal constitution modeled partly upon that of the United States of America but containing some clauses from the *Declaration of the Rights of Man.*

Meanwhile the revolutionary cause was making poor progress from a military point of view. Spanish vessels blockaded the coast of Venezuela, the patriot troops had met with serious reverses, a number of provinces of the country were under full control of royal forces, and enemies of independence were scattered here and there throughout the others. The situation appeared dark enough, and on March 26, 1812, it was made for the time hopeless by a violent earthquake which wrecked many buildings and crushed several thousand people to death beneath their ruins. This catastrophe was at once seized upon by the clergy, many of whom were bitterly opposed to independence, and was pointed out to the ignorant and terrified inhabitants as a proof of the wrath of God against them for deserting their king. This interpretation, as well as the general demoralization caused by the earthquake itself, weakened interest in the revolutionary side; consequently the royalist armies under General Monteverde made marked progress toward the reconquest of Venezuela.

In an effort to turn the tide the congress appointed Miranda commander in chief of the revolutionary forces, and shortly afterwards he was made virtual dictator of the country. Before it was apparent how effectively he could use his power, word came that the important fortified city of Puerto Cabello had fallen into the hands of the royalists. This greatly added to the existing discouragement, and desertions from the revolutionary armies increased in proportion. Consequently Miranda decided to negotiate with Monteverde for peace. The result was the treaty of San Mateo of July 25, 1812, by which the revolutionists agreed to hand over the country to the Spanish authorities, but with the definite pledge on the part of the latter that the lives and property of Venezuelans who had borne arms against the crown should not be harmed. If the Spaniards had kept the terms of the agreement the surrender would perhaps have been the best alternative under the discouraging outlook for the independence faction; but Monteverde promptly broke faith and set about treating Venezuela as a conquered province, imprisoning some of the revolutionary leaders and deporting others. Some of Miranda's subordinates, indignant at him for what seemed to them an unnecessary surrender, prevented his escape to the West Indies by having him thrown into a dungeon. Here he was found by the victorious Spaniards, and after some delay was sent to Spain, where he died in prison in July, 1816.

After the elimination of Miranda from the active struggle for independence in the north, the leadership of the movement was taken over by Simón Bolívar. Bolívar was a young Venezuelan of distinguished family and great wealth who had been trained in the Spanish army in the Indies and had traveled extensively in Europe, where he read the writings of the French philosophers and watched with great interest the development of the French Revolution and the rise of Napoleon Bonaparte. As a result of such influences, in 1805, upon the Aventine Hill in Rome, he made a solemn vow to dedicate himself to freeing the Indies from Spain. In 1807 he was back in Venezuela; and perhaps soon afterwards he became identified with revolutionary activities, for he was a member of the commission which the junta sent to England in 1810 to seek aid. After his return he worked assiduously to promote a sentiment for independence, declaring before a patriotic society of Jacobin type, "We must fearlessly lay the foundation of South American liberty: to hesitate is destruction." He did good service in the field under Miranda, but was the unlucky commander of Puerto Cabello when it fell into Spanish hands; and he was one of the three officers who prevented the escape of the defeated commander in chief,—an act that he appears never to have regretted, for he regarded Miranda as virtually a traitor to his country.

Shortly after the collapse of the revolution in Venezuela, Bolívar, whom Monteverde had permitted to escape from the colony, landed in New Granada, where the events in Venezuela had been paralleled and the viceroyalty had been transformed into the "United Provinces of New Granada." The young revolutionary offered his services to the junta at Cartagena, received a command, and early in 1813 succeeded in driving the royalists from the lower Magdalena valley. After this he was commissioned by the congress of New Granada to carry the war against the Spaniards into Venezuela. Before the end of the year he had captured Caracas, and an extraordinary cabildo had proclaimed him captain-general of the revolutionary army, with the title "Liberator of Venezuela." This made him virtually dictator of the country, but he devoted himself chiefly to the task of driving out the Spaniards. Through the example set by the Spanish commander, the struggle now became unspeakably ruthless and cruel. None was spared on either side; it was "war to the death." Yet the revolutionary armies in Venezuela were badly defeated, Caracas was again lost, and Bolívar withdrew, going once more to New Granada. Finding that the part of the colony which had been freed from Spanish forces was divided into two factions, by means of the sword he induced the refractory province of Cundinamarca to unite with the rest, Santa Fé de Bogotá being made capital of the whole revolutionary area. In May, 1815, a powerful army arrived from Spain; and Bolívar withdrew to the West Indies, as his troops were quite unable to combat those of the crown. By the middle of the following year royalist control had been reëstablished practically throughout Venezuela and New Granada and in almost all other parts of the Indies that had been in arms against the mother country.

This general putting down of rebellion had been made possible by the defeat of Napoleon, and the elimination of his troops from Spain, and the restoration of Ferdinand VII to the throne. But while the return of the legitimate sovereign made possible the prompt suppression of revolt, it also insured ultimate independence, for the king promptly made known by word and action that he meant to rule with despotic power. He set aside by proclamation the liberal constitution adopted by the Cortes of Cádiz in 1812, which recognized the colonies as an integral part of the nation. Ferdinand's policy quickly caused all liberals in the Indies who had stood by him during his imprisonment to turn against him and align themselves with the revolutionaries; and the latter became more determined to secure complete independence.

As has already been indicated, the backbone of the party working for freedom from Spain was made up of the creoles, but many upper-class mestizos were with them. From these two groups, it will be recalled, came the petty civil officers and many of the parish priests. The regular clergy, of whom perhaps most were Europeans, were more conservative than the secular clergy and appear on the whole to have sided with the royalists, though some of the revolutionary leaders were members of religious orders. Naturally the high civil and Church officers remained loyal to the king, and so, it seems, did most of the recently arrived Spaniards who were without office. The aborigines and humble mixed-bloods had no real understanding of what the quarrel was about, but in general they seem to have been inclined to go with the creoles, like themselves natives of the soil. Their actual alignment was determined to a considerable extent, however, by what party was in power in a given section; both sides, but particularly the revolutionists, conscripted them into the armies, often with great harshness. When not in a sufficiently strong position to secure soldiers from the lowly masses by force, creole leaders could sometimes do so by making fair promises. Generally speaking, the soldiers of the revolutionary armies were not paid, and often they were in need of food and clothing. The officers generally suffered and sacrificed as well as the privates; Simón Bolívar gave most of his large fortune toward the cause of freedom.

Bolívar apparently realized that the war would be long and hard; for even before he withdrew in 1815 in the face of superior forces he had begun to dream of freeing from royal control not only the Spanish Main but the whole of South America. He had come to see that as long as any part of the continent remained in the control of Spain the emancipated sections would be in jeopardy. Despite his reverses he did not abandon his dream, partly because of the hope that the restoration of peace to Europe which had made possible Spanish reënforcements would also bring aid to the revolutionary cause from Spain's ancient enemies. In the middle of 1816 he sent a commissioner to England to seek money, arms, and men. Inasmuch as that country was already suffering from the usual postwar hard times and unemployment, the response from the veterans of the Napoleonic conflict was prompt and hearty; but, owing to delays of various sorts the first recruits did not arrive until about a year and a half later. The foreign legionaries were on hand, however, when they were greatly needed, and they played an important part in the liberation of South America from Spain's control. From them Bolívar got some of his most dependable officers. They included some thousands of English and Irish, a considerable number of Germans, and a scattering of various other nationalities, all of whom came in a private capacity and not through government action.

Without waiting for foreign aid, however, Bolívar returned to Venezuela for the second time to resume the struggle in December, 1816. Now, however, he made a flank attack on the colony by entering the Orinoco valley. With the aid of José Páez and an army recruited from the llaneros, he got control of the lower part of the river basin and made Angostura (later named Ciudad Bolívar) his provisional headquarters. Here, at his call, there gathered in October, 1818, a congress of delegates from the sections of Venezuela in revolutionary hands, which chose him president of the country.

At the time, western Venezuela was under the control of very strong royalist forces, but in New Granada the garrisons were small and scattered, so that with the aid of British volunteers, who were beginning to arrive, Bolívar hoped to be able to drive the enemy from the neighboring province. Early in 1819, therefore, he again invaded New Granada, this time by crossing the bleak mountain wall at a height of about thirteen thousand feet, —an achievement perhaps more remarkable than Hannibal's and Napoleon's crossing of the Alps, but matched and preceded two years before by the feat of Bolívar's fellow patriot and rival, José San Martín. The Spaniards were taken by surprise, and on August 7, 1819, were decisively defeated on the banks of the Boyacá River, a little north of Bogotá. The occupation of the capital by the patriot army soon followed, and shortly afterwards all serious resistance by the Spaniards in New Granada was completely broken. In the following December the congress met in Angostura. It proclaimed the union of Venezuela and New Granada under the name "Republic of Colombia" and established a provisional government for it with Bolívar, the "Liberator," as president.

The revolution which took place in Spain the next year (1820) forced Ferdinand to adopt a more liberal and conciliatory policy toward the Indies; he therefore instructed General Morillo, who had command in the north, to negotiate peace with the insurgents on the condition that they accept the Spanish constitution of 1812, which would give them representation in the Cortes. In November, 1820, a six months' truce was agreed to, and Bolívar sent two peace commissioners to Spain with instructions to stand out for the independence of the republic of Colombia. To this the Spanish crown would not agree, and fighting was soon resumed. On June 24, 1821, Bolívar returned to the attack on the enemy in Venezuela and, largely because of the brave stand of the British battalion, was able to rout the Spaniards at Carabobo, thus insuring Venezuela against recapture. Attention was next concentrated on the presidency of Quito, which was still held by the Spaniards. Bolívar sent his ablest general, Antonio José de Sucre, to invade it by sea, and somewhat later he himself started on a long southward march from New Granada toward it. Sucre broke the power of the Spaniards before his commander in chief arrived, in a decisive battle fought May 24, 1822, on the steep slopes of the volcano Pichincha, overlooking the city of Quito. Promptly afterwards General Aymerich, commander of the Spanish armies in the region, formally surrendered the whole province of Quito. Bolívar, who had fought minor engagements on the way, entered the city of Quito from the north about a month later and proclaimed the conquered territory a part of the republic of Colombia.

THE STRUGGLE IN THE SOUTH

While Bolívar and his lieutenants were thus freeing northern South America from Spanish control, a similar movement was going on in the southern part of the continent. In that quarter the earliest stirrings definitely in behalf of complete independence centered at Buenos Aires, a fact that may be explained by the estrangement of the inhabitants from Spain through their long commercial isolation and by a victory they won early in the Napoleonic wars. On June 27, 1806, a British fleet captured Buenos Aires, but on August 12 the captors were captured by the colonial forces led by Santiago de Liniers, a French officer who had served under Spain. Shortly afterwards a cabildo abierto elected Liniers military commander of the port instead of the weak viceroy who had capitulated to the British. This choice was later sanctioned by a royal order, which made Liniers the viceroy of La Plata. In July, 1807, the British attempted another attack, but were driven off by Liniers.

This experience in self-defense gave to the people of the port confidence in themselves, and a bent toward independence manifested itself not long after Napoleon's invasion of Spain. A cabildo abierto in Buenos Aires on May 22, 1810, set aside the vacillating viceroy Cisneros, and created a provisional junta of the provinces of the Rio de la Plata, which nominally was to act for Ferdinand of Spain. A considerable element in the port city, however, particularly Mariano Moreno, "the soul of the revolution of 1810," stood for complete independence. Besides his work in connection with the *Gaceta*, which he founded to spread the idea of freedom from Spain, Moreno was secretary of military and political affairs in the revolutionary government; but his period of influence was short, for he died in 1811. During the next five years there were various changes in the government at Buenos Aires, but generally it was weak and turbulent. While it still pretended to act in the name of Ferdinand, it set about revolutionizing the rest of the viceroyalty of the Plata and uniting it politically with Buenos Aires; in this, however, it met with small success.

The authorities at Asunción soon became aware of the designs of Buenos Aires and decided to resist them, although they maintained a politic friendliness toward the *porteños* (people of the port). A congress of Paraguayan delegates, therefore, besides declaring for Ferdinand, voted to form a junta of war, ostensibly to prepare for possible Portuguese aggressions but chiefly with the idea of protection against attempts at conquest on the part of their neighbors on the Plata. The latter, soon convinced that the Paraguayans aimed to remain aloof, sent against them an army under Manuel Belgrano, which was decisively defeated in March, 1811. Later Buenos Aires tried repeatedly by peaceful means to induce Paraguay to unite with her, but in vain. Under the shrewd leadership of José Gaspar Rodríguez Francia the province kept apart from the government at the mouth of the Plata,[1] but continued its nominal loyalty to the Bourbon king until October 12, 1813, when it declared complete independence and, without a struggle, set up a permanent national government.

In the region to the east of the Uruguay River (known at the time as the Banda Oriental, or Eastern Bank), now occupied by the Uruguayan republic, the leader in the movement against Spain was a picturesque gaucho soldier named José Artigas. Early in 1811 Artigas took up arms against Elio, the newly appointed viceroy of La Plata, who at the time resided in Montevideo. Finding himself hard-pressed by the revolutionaries of the Banda Oriental, Elio appealed for aid to the Princess Carlota Joaquima, wife of Prince João, the regent of Portugal, who with his family had fled to Brazil in 1808 to escape the armies of Napoleon. Carlota Joaquima, who was a sister of the imprisoned Ferdinand of Spain, considered herself heir to his realms in America and aspired to establish control over the Plata basin. Accordingly, in July, 1811, Portuguese forces invaded the Banda Oriental, but a temporary armistice between Elio and the Buenos Aires junta soon caused them to withdraw.

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[1] A treaty of defensive alliance was made with the junta at Buenos Aires, but was never put into effect.

At first Artigas was favorable to a federation of all the Plata provinces, and delegates from each of five Oriental cabildos were sent to the constituent congress which met in Buenos Aires in the autumn of 1813. But the delegates were instructed to stand for the complete autonomy of their province. This was not to the liking of the men in control on the other side of the river, who were favorable to centralism, with themselves at the center; therefore they refused to admit the Orientales, on the pretext that their credentials were unacceptable. This attitude caused Artigas to face about and become a fierce champion of a sovereign and independent Banda Oriental.

Consequently the authorities at Buenos Aires declared the gaucho statesman a traitor and placed a price upon his head. In 1814 they succeeded in capturing the Banda Oriental, and held it for a year, after which Artigas gained control and ruled the land under the title of "Protector." Much turbulence prevailed, however, and this offered an excuse for the Portuguese to invade the region in 1816 under the pretext of protecting Brazilian borders from anarchy. During the next four years the territory was swept by war between the Orientales and the Portuguese; but by the latter part of 1820 the invaders were in control of the Banda Oriental. It was annexed to Brazil as the Cisplatine Province and retained that status for several years. Meanwhile José Artigas, despairing of gaining independence for his people, took refuge in Paraguay, where he ended his days.

The efforts of Buenos Aires to control the presidency of Charcas, or Upper Peru, were as futile as its approaches to the other provinces of the former viceroyalty. Repeated efforts to send a military expedition into the region finally ended on October 1, 1813, when an army under Manuel Belgrano was destroyed by Spanish troops. This disaster led to Belgrano's replacement early in 1814 by José San Martín, the ablest commander produced by the struggle for independence in the southern half of the continent.

San Martín was born in 1778 in a little Indian village on the right bank of the Uruguay River, where his father, a Spanish military officer, was in charge; but when the boy was seven the family returned to Spain. José served in the Spanish armies in Europe for twenty-two years, beginning when he was eleven years old, and won considerable distinction. He had gained the rank of lieutenant colonel when Joseph Bonaparte was placed upon the throne of Spain, but soon after this he began to plan a change. The cause may have been the cowardly actions of the Bourbon sovereigns of the country in yielding to Napoleon, combined with the feeling of San Martín that his services had not been properly appreciated. In any case he resigned his commission in the Spanish army and early in 1812 reached Buenos Aires, where he offered his services to the cause of independence. However, a few months after he succeeded Belgrano as commander of the army designed to enter Upper Peru over the Andes he decided that the plan could not meet with success and resigned his commission. A little later (in April, 1814) he accepted the governorship of the intendancy of Cuyo, which lay along the foothills of the Andes directly east of Santiago de Chile.

The reason he gave for his move was the wish to improve his health, but his real motive was the desire to execute an ambitious and daring plan for the conquest of the Spanish stronghold of Peru by invading it from the sea after liberating Chile. In Chile the revolution in behalf of Ferdinand had been transformed into a movement for complete independence. It was headed at the time by Bernardo O'Higgins, who had been in London some years before and had there come under Miranda's influence. In October, 1814, the insurgent forces of Chile were badly defeated, and a portion of them fled with O'Higgins to Mendoza, the capital of Cuyo. Here they were cordially welcomed by San Martín and helped form the nucleus of an army which he spent three years patiently recruiting and drilling. During most of this time San Martín was without official recognition in a military way from Buenos Aires and received little support or encouragement from that quarter. His difficulties were much like those of George Washington at Valley Forge, waiting for help from the rather helpless Continental Congress. The chief needs at Mendoza were food and clothing for the soldiers, and money for the purchase of military supplies. But the inhabitants of Cuyo had confidence in San Martín and rallied to his aid, contributing money as well as food from their plantations and ranches. Once, when the outlook was very dark and the need for funds great, the women of Mendoza sent him a collective gift of their jewels.

Early in 1816 the prospects brightened for San Martín and his army, for the authorities at Buenos Aires were roused by the restoration of Ferdinand to the throne of Spain and by the fact that everywhere in the Indies except in the Plata basin the revolutionary movement had been crushed. The region over which the porteño politicians had nominal sway (by this time called the United Provinces of la Plata) was virtually in a state of anarchy; and if the situation was to be saved, some serious effort must be made. Therefore a general congress of delegates was called by the "supreme director" at Buenos Aires to meet on March 24, 1816, at Tucumán, an interior town being chosen in the hope of securing the support of those jealous of the port city. No representatives came from Paraguay or the Banda Oriental, though invitations to participate in the congress were sent to them. A few men were present from Upper Peru, but the gathering was largely made up of delegates from the region now known as Argentina. In an effort to secure needed funds, the congress promptly voted in favor of forced loans; and with the aim of strengthening political authority it elected a delegate from Cuyo, Juan Martín Pueyrredón, as supreme director with well-nigh dictatorial powers.

A question calling for more debate was that of the political status of the Plata provinces, which had for six years been maintaining in practice an anarchical sort of independent sovereignty but were still nominally loyal to Ferdinand. In view of the fate that had befallen other parts of the Indies which had been in arms against Spain, a declaration of complete independence at this time would, in the view of some, be likely to borrow new troubles. Yet it was apparent to many that the anomalous political position of the United Provinces was a source of serious weakness; to a few it appeared preposterous. San Martín, in a letter written to a delegate friend in April, asked the clarifying question "Does it not indeed appear ridiculous to coin money, to have a flag and a national cockade, and, lastly, to make war on the sovereign on whom it is believed that we are in a state of dependence?"[1] Finally, on July 9, 1816, after weeks of hesitation and discussion, a brief declaration of independence "of Ferdinand VII, of his successors, and of the metropolis of Spain" was adopted by the congress in the name of the "United Provinces of South America."

On his way to Buenos Aires (which the congress at Tucumán had named as capital of the United Provinces), Pueyrredón, the new executive, had a conference with San Martín and promised him aid and support. Before the close of the year the latter had been made captain-general of the Army of the Andes, which he had built up, and was provided with supplies of various sorts. By January, 1817, the army, now numbering about four thousand men, was disciplined and equipped, and the march over the mountains began. The troops proceeded by two main divisions —one by the pass of Los Patos and the other by Uspallata, the latter having a height of about twelve thousand feet. In three weeks the difficult crossing was substantially ended and the western slopes of the Andes were reached. As San Martín had planned, the royalist forces were taken by surprise, and on February 12 they were routed near the village of Chacabuco, thus opening for the invading army the road to Santiago, which was evacuated by the Spanish forces as the Army of the Andes approached. A cabildo abierto held in the Chilean capital unanimously elected San Martín governor of the country; but as the task which he had undertaken was not yet finished he declined the office. It was then given to O'Higgins, who had been one of the chief officers of the liberating army. Chilean independence, proclaimed on the first anniversary of the victory of Chacabuco, was insured on April 5, 1818, when San Martín routed the Spaniards on the plains of Maipú, near Santiago.

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[1] Quoted in Robertson's *Rise of the Spanish-American Republics*, p. 186.

Shortly afterwards he began preparations for the invasion of Peru. Some aid came from the United Provinces of the Plata; and Chile created a small navy, which was put in charge of Lord Cochrane, a doughty and energetic British naval officer who arrived late in 1818 to aid in the revolution. While San Martín was gathering and equipping his new army Cochrane cruised up and down the coast doing so much damage to the Spaniards as to win from them the nickname *el Diablo* (the Devil).

In the ancient viceroyalty of Peru there had been conspiracies against the government and small uprisings; but these had been crushed, and when San Martín was ready to embark his army upon Cochrane's fleet the whole of the colony was apparently quiet and under royalist control. Hence there appeared to be no chance for such important revolutionary coöperation from Peru as had been given by Chile in breaking Spanish power there. San Martín was afraid to attempt a direct trial of strength between his army of a few thousand men and the strong royalist forces of Peru; accordingly he determined to avoid the well-garrisoned centers and to land his troops at the little port of Pisco, far south on the Peruvian coast. This was accomplished in September, 1820; and from this isolated base revolutionary propaganda was spread, and military expeditions were sent out which won minor battles in the thinly settled interior.

San Martín's policy was successful. Deserters from the royalist side joined his army in considerable numbers, and after some months he was able to sail north and capture Callao. Before this, however, as will be recalled, events in Spain had forced Ferdinand to take a conciliatory policy. Consequently the viceroy of Peru had begun to negotiate with San Martín shortly after the invading army had landed on Peruvian soil. The discussions were as futile, however, as those in which Bolívar's commissioners were engaged at the same period, for San Martín was as determined as Bolívar to accept nothing short of independence. This he asked for Peru; but the concessions made to the colonies by the Spanish constitution of 1812 were all that the viceroy could offer to the revolutionary leaders.

Shortly after the negotiations had proved vain, La Serna, the viceroy, withdrew his weakened forces from Lima and retreated toward the Andes. Promptly after this a delegation from the cabildo of the capital invited San Martín and his forces to enter, which they did on July 12, 1821. A cabildo abierto called at San Martín's suggestion voted for independence from Spain; and on July 28, in the presence of a great crowd in the main plaza of Lima, San Martín unfurled a new flag for the state, proclaiming: "Peru is free and independent, by the general wish of the people, and by the justice of her cause, which may God defend."

Independence for Peru had yet to be won, however; for strong, undefeated royalist forces were still in the country, in control of most of the eastern part of it and the whole of the presidency of Charcas. Therefore San Martín felt that the time had not yet come to give Peru the self-government which he had promised, for to call a congress would be likely to prove embarrassing through the royalist sentiment which the gathering might reflect. Hence he proclaimed himself supreme civil and military dictator, but promised to give up his authority as soon as independence should be insured. Unfortunately this act caused some to suspect him of having selfish designs on the government. He was also criticized, even among his own soldiers, for not proceeding more vigorously toward clearing Peru of Spanish forces. Before the end of the year his prestige had seriously waned.

San Martín's failure to proceed against the Spaniards was caused by the fact that his available forces were less than half the size of those of the enemy, and he aimed to secure additional troops before attempting the completion of the conquest. He had been in correspondence with Bolívar, who at the time was completing the conquest of Quito, and had been offered aid by him, which he decided to accept. Therefore a conference between the two was arranged. It took place on July 26 and 27, 1822, at Guayaquil.

It was one of the fateful and dramatic meetings of history.

At the time, San Martín was forty-three years old and Bolívar was thirty-nine. Both were of striking and distinguished appearance. The former was dusky-skinned and black-eyed, and notable for his Roman nose and long, heavy chin; the latter had a very slender, thin, sensitive face, a high forehead, and piercing black eyes. Neither was above average height. Their characters were in rather strong contrast: San Martín had great capacity for patience and self-sacrifice, and knew how to make honorable compromise with his dearest ambitions; Bolívar was proud, high-strung, and desirous of power and glory. Both men were deeply attached to their country and willing to give their best for what they thought to be its good; but San Martín would probably have been the better statesman, since he was more mature and more practical through having suffered disillusionment during his career in Spain.

At the interview the two commanders of the liberating armies discussed the completion of the war of revolution and the future government of the territory, and disagreed with reference to both matters. The details of what took place are not known, because both men were so devoted to the cause of liberty as to conceal their differences from the soldiers under a veil of apparent harmony and friendship; and neither left a specific record of the conference. It is pretty certain, however, from a later statement of San Martín that Bolívar did not think that the number of troops desired by the former for the liberation of Peru would be necessary, and that he expressed a delicate unwillingness to have San Martín serve under him, which San Martín had offered to do. In view of what is known of the characters and dispositions of the two men, it is difficult to escape the conclusion that the basic trouble was caused by ambitious jealousy on the part of Bolívar. He apparently felt that the presence of San Martín even in a subordinate position would interfere with the realization of his large political dreams, as would also San Martín's frankly expressed desire that the former colonies of Spain be made into independent monarchies to be ruled over by European princes. Bolívar seems to have had the honest conviction that such Old World connections would be undesirable for America, and he wished to confederate the territories under one general ruler, who was evidently meant to be himself.

No arrangement was reached between the two commanders for carrying on the revolution in Peru; and San Martín, who was in poor health and discouraged over the criticisms to which he had been subjected, decided to withdraw for the good of the cause to which he had given the last ten years. He called a Peruvian congress, to which he resigned his office as protector of the country, refused the position of generalissimo of military and naval forces to which the gathering appointed him, and departed for the south. It was San Martín's desire to live in quiet retirement in Argentina, and he established himself upon an estate near Mendoza; but he found it impossible to avoid being drawn into unpleasant political factionalism, and therefore in 1829 he became a voluntary exile from his beloved land and spent his remaining years in Europe.

Soon after San Martín's withdrawal Bolívar began preparations to drive the Spaniards from their last South American stronghold. Armies composed of men from many parts of the continent were equipped and drilled by Sucre, and as soon as possible sent into action. The decisive conflict in Peru proper took place on December 9, 1824, when the royalist forces were defeated in the battle of Ayacucho, which yielded the viceroyalty to the revolutionaries. Early in the following year the armies led by Sucre were likewise dominant in Charcas. Under his influence a congress was called which, on August 6, 1825, declared the province independent. A few days later it was renamed the Republic of Bolívar, afterwards changed to Bolivia; and the capital, Chuquisaca, was now called Sucre. Thus was completed the emancipation of South America from the Spanish crown.

THE EMANCIPATION OF NEW SPAIN AND GUATEMALA

Three years earlier independence had been established in New Spain; but in that colony there was much conflict and confusion of issues, which increased later problems. When word reached Mexico City of the abdication and imprisonment of Ferdinand VII and the accession of Joseph Bonaparte, the cabildo moved for loyalty to the former and suggested that sovereignty for the time be exercised by itself, by the audiencia, and by other local bodies and officials. The audiencia promptly snubbed the cabildo for its political ambitions; but the viceroy, José de Iturrigaray, who dreamed of becoming independent sovereign of Mexico because of the recent events in Spain, from policy favored the municipal officials in opposition to the audiencia. In the interest of his personal aims, however, he tried to delay taking a stand against Napoleon. In accordance with the ideas of the creole leaders he called a general junta; but before the close of 1808 a group of Spaniards who resented his obvious separatism and his political ambitions threw him into prison and named another to take his place.

This brought the dominant group into greater sympathy with the Bourbons, and in March, 1809, they recognized the supremacy of the central junta at Seville. But Iturrigaray's successor was old and weak and quite unable to cope with the difficult situation; and the Seville junta displaced him in favor of the archbishop of Mexico, who added variety by leaning toward the separatist creole element, though he himself was loyal to the imprisoned Ferdinand. After two years the central junta removed the archbishop and gave the audiencia full control for a few months, at the end of which, in September, 1810, a new viceroy was sent out from Spain.[1]

The rapid changes of authority and the repeated requests from Spain for funds to use in Ferdinand's cause added to creole dissatisfaction in Mexico, as well as to the separatist spirit caused by Napoleon's meddling in Spanish affairs. In some quarters sentiment in favor of revolt was strong. An uprising was planned by two creoles to take place in December, 1809, at Valladolid, in the province of Guanajuato. The idea was to secure strong Indian support by promising abolition of tribute; but the conspiracy was discovered and nipped in the bud.

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[1] During this period of confusion and divided authority an Indian, as representative of the royal line of the Aztecs, desired to be crowned king of New Spain, and the ambitious Carlota Joaquima urged the audiencia to have her son Dom Pedro rule for his uncle Ferdinand.

The first serious movement toward separation from Spain was begun by Miguel Hidalgo y Costilla, the green-eyed, white-haired creole curate of the village of Dolores, in the same province of Guanajuato. Hidalgo, benevolent, scholarly, worldly, and shrewd, had more than once been in trouble with the Inquisition, for he harbored heretical views, as well as political ideas born of the French Revolution. The revolt of which he was ringleader took place on September 16, 1810.[1] According to tradition the launching of the movement was marked by the ringing of the bell of the Dolores church, and the uprising was given something of the bigotry as well as the fervor of a crusade by the fact that Hidalgo chose as his standard a sacred banner bearing the picture of the Virgin of Guadalupe. From the banner came the religious note in the battle cry, known as the *Grito de Dolores*: "Long live Our Lady of Guadalupe! Long live independence!" For a time the revolt spread rapidly and gained a considerable creole following from those disgruntled over recent events; but, unfortunately, making the Virgin of Guadalupe the special patron of the movement attracted to it a great number of aborigines and low-class mestizos. Hence Hidalgo's army quickly degenerated into a frenzied, lawless mob which committed such horrible acts of violence as to turn away many who might have been influential supporters and to stimulate the government authorities to energetic action in restoring order. In January, 1811, the rebels met with serious defeat, and a short time afterwards Miguel Hidalgo, the "father of Mexican independence," was captured, tried, and executed by a firing squad.

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[1] The plotters, who included Miguel Domínguez, corregidor of Querétaro, had set December 8 as the date for the uprising, but their plans became known to the loyal element. To prevent full disclosure, Domínguez was forced on September 13, 1810, to arrest a man implicated in the plot; but the corregidor's wife, Josefa María Ortíz de Domínguez, known in Mexican history as "the Corregidora," was also one of the conspirators and warned another of the leaders, who carried word to Hidalgo. The corregidor and Josefa María were promptly imprisoned; but Hidalgo was able to launch the revolt prematurely. The two prisoners mentioned were soon released and lived to work further for independence and to see it realized.

The revolution was continued, however, by another priest, a mestizo named José María Morelos, who had served under Hidalgo. Much of the country south of the capital fell under his control; and on November 6, 1813, a congress which he called at Chilpancingo drew up a declaration of independence from Spain. The next year the gathering adopted a provisional constitution; but there was no opportunity to put it into effect, for the royalists rapidly regained control. Morelos was captured, given a speedy trial by the Inquisition, unfrocked, and condemned to death, and on December 22, 1815, he was, like his former leader, executed by a firing squad.

Even these misfortunes did not end the movement for independence launched by Miguel Hidalgo. For the next five years unorganized fighting of the guerrilla type continued against the royal government in various parts of the country. But it had apparently lost ground rather than gained it when the revolution of 1820 in Spain caused Ferdinand to restore the liberal constitution of 1812.

This royal concession, which was proclaimed in New Spain on May 3, 1820, by the viceroy, was received with very mixed emotions. The liberal and revolutionary element hailed it with joy; but to the clergy, whose privileged position was impaired by the constitution, it seemed like a deathblow, and to devout lay conservatives the change was far from welcome. Later word that in harmony with the constitution the new Spanish Cortes had passed various decrees against the Church alarmed the clerico-conservative element still more and incited in New Spain a revolt against the existing liberal movement in the mother country. One of the leaders in the new movement was an ambitious mestizo, Agustín de Iturbide, a retired officer of the royal army, who had fought against Hidalgo. To secure troops for use in a conservative revolution, Iturbide offered to end the guerrilla struggle. The viceroy authorized him to do so and provided him with an army.

Late in 1820 he left for the south, but shortly after beginning his campaign against the rebels he opened negotiations with Vicente Guerrero, their leader, suggesting a joining of forces in what virtually amounted to a counter-revolution. The agreement reached between the two is known as the plan of Iguala, from the little village where it was first published on February 24, 1821. It declared New Spain sovereign and independent, and it set forth a conservative scheme of government which pledged full protection to the Roman Church and promised a monarchical form of government regulated by a constitution suited to the needs of the country. The sovereign was to be the conservative Ferdinand VII or a member of some other royal family of Europe. The preamble of the document made a special appeal to all classes for union and coöperation.

The population responded in considerable numbers to the appeal and the plan. Some of the royal troops who favored the new movement overthrew the viceroy. When his successor, Juan O'Donojú, arrived from Spain he was forced to sign a treaty at Córdova, on the way to the capital. The treaty indorsed the plan, to which had been added a proviso that if no royal European would accept the throne of Mexico the Cortes of the country (for which the plan provided) should elect a ruler. On September 27, 1821, shortly after the agreement was made, the revolutionary forces, which had broken Spanish resistance in surrounding parts, entered Mexico City under the leadership of Iturbide, who was enthusiastically hailed as the "father and liberator of his country."

Iturbide, in accordance with the plan of Iguala, created a provisional junta, of which he made himself president. The organization signed a declaration that Mexico was an independent empire and swore to support the plan of Iguala and the treaty made with O'Donojú at Córdova. To provide for executive authority until an emperor should be acquired, the junta also appointed a committee of regency, with Iturbide as its president, and convoked a constitutional congress, which, with the idea of keeping the monarchist element dominant, was chosen indirectly.

However, the congress proved much less friendly to Iturbide's ambitions than he had hoped; for it included a considerable number of members of the original independence faction, and these desired a republic. The republican element was also resentful; for though it had helped Iturbide to gain military victory, it had since been ignored by him. Moreover, when word was received that the Spanish Cortes had repudiated the treaty of Córdova, the members of the congress who had favored a Bourbon ruler, suspicious of Iturbide's aims, lined up with the republicans rather than with the ambitious president of the regency. Open friction soon developed between the two groups, Iturbide's popularity waned, and republicanism rapidly gained adherents.

Seeing that he could not secure by quiet action of congress the coveted imperial crown, Iturbide determined to gain it by creating through bribery an artificial demand for himself as monarch of Mexico. His plan was a success. A staged military rising occurred, accompanied by cries of "Viva Agustín I!" and these were taken up by the crowds in the streets, who demanded Iturbide's coronation. At first the plotter feigned reluctance to accept the honor, but soon consented. He had the support of various upper-class monarchists, and was chosen emperor at a special session of congress from which certain members were barred. On July 25, 1822, he was crowned.

In the general revolutionary movement sweeping the Indies after Napoleon's intrusion into Spain the captaincy-general of Guatemala had a part. Juntas avowing allegiance to Ferdinand were formed there and proceeded to exercise much authority; but no serious activities in behalf of freedom from Spain took place until September, 1821, when, stimulated by the happenings in Mexico, the junta in Guatemala City declared for independence. Shortly afterwards Iturbide sent an invitation to the former captaincy-general to become a part of Mexico. The province of Guatemala accepted, and had a few deputies present in the Mexican constitutional congress which met early in 1822; but the remaining provinces were, on the whole, republican in their leanings and opposed both the plan of Iguala and union with Mexico.

Consequently, after Iturbide's coronation he demanded that he be proclaimed emperor in the principal cities and towns of the old captaincy-general, and sent troops to force the unwilling sections to accept his authority. Salvador, long resentful of dominance by the large province of Guatemala, was especially republican in sentiment and was strongly against the proposed union with Mexico. In an effort to escape the threatened imperial rule, a congress of delegates of the little province voted in December, 1822, for incorporation with the United States of America, to which it looked "as the head of the great republican family"; but the authorities at Washington gave no attention to the compliment paid to it by Salvador. Salvador, however, was saved from the dreaded fate by the fact that in the spring of 1823, before Mexican coercion had gone very far, Agustín I was forced to resign his throne.

When General Filisola, commander of the Mexican military expedition against the former captaincy-general, learned of Iturbide's downfall, he called a national constituent assembly to meet in Guatemala City, for he sympathized with the apparently general desire for independence and union. All parts of the old political unit were represented except Chiapas, which remained permanently with Mexico. On July 1, 1823, the assembly declared the former captaincy-general of Guatemala free and independent under the new name "United Provinces of Central America."

THE REVOLT OF SANTO DOMINGO

The only one of Spain's insular possessions to gain freedom from the mother country during the period now under consideration was Santo Domingo, in the eastern end of the island formerly known as Hispaniola. The chief causes for this unique fortune, which proved something of a calamity, were the colony's poverty and its geographic relationship to Haiti. As has already been stated, the big mining booms on the mainland struck a hard blow at Hispaniola's economic progress through draining away many planters, and caused the colony to revert largely to pastoral pursuits. The stock-raising was carried on in a haphazard manner and was of little commercial importance. During the period when Saint-Domingue was the queen of the Antilles its Spanish neighbor was a sad contrast; and when the former became a wreck the latter remained unprogressive, poverty-stricken, and of so slight economic importance as to be of little concern to the mother country. It will be recalled that in 1795 Spain ceded the colony to France.

During the few following years of its nominal control by France, while Europe was rocked with war, the chief French influence came from Saint-Domingue, at the west, in the form of revolutionary philosophy brought by the creole refugees fleeing from the relentless war waged by the Negro ex-slaves. Though the Spanish part of the island was about twice the area of the French part, its population in 1800 was but a small fraction of that of the latter. Hence, after French control had ended in Saint-Domingue, the relation of the two parts became a matter of great importance to the weaker. The one was quite at the mercy of the other. Toussaint L'Ouverture, as has been stated, easily conquered Santo Domingo, thus controlling the whole island. But Dessalines was contented with Haiti, the French part. Therefore in 1808, while Napoleon was absorbed with difficulties in Europe, Spain was able, with some aid from England, to resume control of the eastern part of the island.

However, a desire for complete independence had already begun to grow in this oldest of Spain's colonies, and it was aggravated by events in the mother country and by revolutionary movements in South America; but the restoration of Ferdinand VII and the establishment of peace in Europe prevented the execution of plans for revolt until near the close of the general struggle for freedom of the Indies. On November 30, 1821, the die was cast by a strong and successful uprising against the Spanish authorities. The next day the colony was proclaimed an independent state, and a constitution was adopted declaring the state, which was far too weak to stand alone, to be an integral part of the republic of Colombia. José Núñez de Cáceres, a prominent lawyer who was leader of the movement, was made president. Since it was necessary to get aid in the maintenance of independence as soon as possible, an agent of the government was promptly sent to secure Bolívar's acceptance of the Dominican affiliation with Colombia, with the implication of protection from the latter. By this time, however, Bolívar was far away in Quito, and nothing came of the effort. To French Haiti was sent another emissary, instructed to form a treaty of friendship. From Jean Pierre Boyer, then president of the state, he brought back the dismaying word that the island was "one and indivisible," accompanied by the invitation to his Spanish-speaking neighbors to come under the Haitian flag. Without waiting for a reply to his unwelcome invitation, Boyer sent across the border a strong army which quickly overran the helpless little state. On February 9, 1822, Cáceres was forced to hand over the keys of his capital, Santo Domingo City, to the invader. For twenty-two years after this the eastern part of the island was under the political domination of the western part.

THE INDEPENDENCE OF BRAZIL

Brazil became free and sovereign during the general movement for independence in the first quarter of the nineteenth century, but peculiar conditions gave it a different political history from its Spanish neighbors. Because of the close resemblance between their political and economic systems there existed in the Portuguese colony much the same grievances against the mother country as in the Spanish Indies. Moreover, a nationalistic spirit had begun to develop in Brazil as early as the middle of the seventeenth century through the wars by which the Dutch were driven out, and it was greatly fostered by the struggle between the Paulistas and Portuguese in Minas and by Bekman's rebellion in Maranhão. The writings of the French philosophers played a part in stimulating discontent, as did also the American and French revolutions. In 1785 a group of Brazilian youths studying at the University of Coimbra wrote to Thomas Jefferson (then in Paris) asking the aid of the United States in freeing Brazil from the Portuguese yoke—a request which it would have been impossible for the weak infant republic to grant, since it was at the time sailing through the troubled waters of its "critical period." A few years later one of these students, Vidal Barbosa, returned to Brazil and discovered that among the intellectuals of Minas there was a desire to bring about independence. Accordingly a conspiracy was formed under the leadership of a certain cavalry ensign named Joaquim José da Silva Xavier, but commonly referred to by the nickname "Tiradentes." The group of youthful enthusiasts adopted a national flag and drafted a number of liberal laws for an independent Brazil; but the plot was discovered, Tiradentes was executed in 1792, and the others were imprisoned in Africa.

For some years after this, Brazil was apparently quiet and submissive. Then came an event which marked the beginning of the end of Portuguese rule in America—Napoleon's invasion of the Iberian Peninsula, at first directed against Portugal as an ally of England. At the time, Prince João was regent for his mother, María I, who was hopelessly insane. In this crisis Lord Strangford, British minister in Portugal, advised flight to Brazil. Preparations were hastily made, and, convoyed by British warships, the Portuguese royal fleet left Lisbon on November 29, 1807, bearing the Braganza family, the court, and numerous others, including a considerable military force—about fifteen thousand persons in all. It was a narrow escape, for when the vessels were leaving the mouth of the Tagus the French army appeared over the crest of hills behind Lisbon. The fleet stopped first at Bahia, the old capital of Brazil, where Regent João inaugurated a new policy by opening this and the other ports of Brazil to the direct commerce of friendly nations. He then went on to Rio de Janeiro and was joyfully hailed by the populace as the "Emperor of Brazil."

Shortly after his establishment in Rio de Janeiro, João began a number of reforms which gave to the colony a new dignity. He removed restrictions that had been placed by María upon certain industries, passed decrees for the improvement of agriculture and transportation and the modernization of the capital, founded the Bank of Brazil, introduced the printing-press, established a public library, a botanical garden, an academy of fine arts, and a number of professional schools (including one for the study of medicine), and invited artists and scholars to visit the land. Brazil's period of isolation was at an end. On

December 16, 1815, a decree formally proclaimed the changed status of the colony, making it a coördinate part of the United Kingdom of Portugal, Brazil, and Algarve. In the following year Queen María died, and the regent became King João VI.

These various progressive changes naturally pleased the Brazilians, although having their sovereign in their midst was not entirely advantageous. To keep the many subjects who accompanied him into exile satisfied, the regent distributed among them titles of nobility and offices with a lavish hand, a procedure very objectionable to the Brazilians. Moreover, the latter soon found that their taxes were much heavier than before, owing to the cost of supporting the royal establishment and its horde of ravenous hangers-on, as well as to the expense of the wars in which João engaged.

The most significant of his military struggles, that with the Banda Oriental, has already been referred to as stimulated by the ambition of his wife, Carlota Joaquima. After one or two futile efforts Montevideo was captured by Portuguese troops in 1817, and then followed the incorporation of the Banda with Brazil as the Cisplatine Province. Hardly had this been accomplished when revolts, caused by the evils of João's reign and the stimulation of events in the Spanish colonies, broke out in Pernambuco, in Rio Grande do Norte, and in other northern provinces. By a quick dispatching of troops to the spots the uprisings were crushed and the leaders were put to death.

Meanwhile things had gone badly in Portugal, which had nominally been governed by a council of regency appointed by João in 1807. In August, 1820, revolutionaries overthrew the government and provisionally adopted a constitution modeled on the Spanish constitution of 1812. The Portuguese Cortes, which had not met for more than a century, was called, and invited Brazil to send delegates to a constitutional convention; it also asked João to return to Portugal. To add to the king's embarrassment, events in Portugal were echoed in Brazil. Pará proclaimed a liberal constitution, a revolt in Bahia ousted the governor and replaced him by a provisional junta, and even in Rio de Janeiro insurrection was threatened against the unpopular rule. In the hope of pacifying the land the king promised a constitution and called a convention. He soon quarreled with it, however, and dispersed it with troops, killing some of the members. He did not feel safe to remain longer away from Portugal, and prepared to depart, leaving his son Pedro as regent. Realizing that a move for Brazilian independence was imminent, he gave instructions that if such separation came the prince should take the crown of the country before another could do so. On April 24, 1821, he sailed to look after his turbulent European possessions, taking with him three or four thousand Portuguese nobles and the greater part of the money in the treasury.

The outlook for permanent control of Brazil by Portugal rapidly became worse by the action of the jealous Portuguese Cortes, which in quick succession restored various discriminatory acts relating to the erstwhile colony. This convinced Brazilian leaders that the plan was to restore the new kingdom to its former colonial status. Finally the Cortes instructed Pedro to return to Portugal. The time for action, in the view of the Brazilians, had now come. Under the leadership of José Bonifacio de Andrada e Silva, Pedro's minister of the interior and foreign affairs (see page 268), they made a stand for independence. To Pedro were sent petitions and letters begging him to stay and warning him that if he departed from the kingdom it would be lost to Portugal. Many other communications sent to the prince frankly urged the complete freedom and sovereignty of Brazil. Pedro, influenced by these various demonstrations and by his father's departing instructions, decided to stay. He therefore ordered home the Portuguese royal fleet, which had even tried to kidnap him and carry him back to Europe, and commanded that no act passed by the Portuguese Cortes be enforced in Brazil without his consent.

The movement toward independence progressed rapidly, the chief hotbeds of separatist ideas being, as was to be expected, Minas Gerães and São Paulo, where Masonic groups were engaged in spreading incendiary ideas. Pedro traveled in these provinces and was warmly received, not as a viceroy of a colony but as ruler of a free and sovereign state. This helped him to determine to become such. On September 7, 1822, beside a little stream called Ypiranga, near the city of São Paulo, he tore from his uniform the Portuguese colors and uttered the informal proclamation since known as the *Grito do Ypiranga*, Brazil's declaration of independence: "It is time! . . . Independence or death! We are separated from Portugal!" On October 12, 1822, he was proclaimed emperor of Brazil. Meanwhile separatist sentiment spread very rapidly, leaving little opposition to independence except among the Portuguese, who were well in the minority. By the end of July, 1823, the Brazilians, aided by Lord Cochrane, who had served the Chileans on the west coast, had driven out the Portuguese troops. But before this (December 1, 1822) the prince regent was crowned Pedro I, Emperor of Brazil. Thus it happened that Portuguese America, unlike the colonies of Spain (except Mexico), began its independent career as a monarchy instead of as a republic.

XIV

THE END OF SPANISH RULE IN AMERICA

In fine, what is the Spanish government in Cuba, but an armed monarchy, encamped in the midst of a disarmed and disfranchised people?

RICHARD HENRY DANA, *To Cuba and Back*, p. 235

NOT until three quarters of a century after the continental part of the Indies had become free from Spain was that country's flag hauled down in the remaining portion—Porto Rico and Cuba. The failure of these two colonies to escape from the mother country at the time of general emancipation was largely the result of their insular isolation, which made it less easy than on the mainland for incendiary ideas to enter and for outside aid to be secured, and in the islands it was easier to catch conspirators and to put down revolt. Furthermore, though both Cuba and Porto Rico had suffered from the general ills of the Spanish colonial system, neither seems to have had much sense of grievance in 1810, when revolutionary outbreaks began in other quarters. This was partly the result of the influences just mentioned; but Cuba, at least, was fairly well satisfied, since after its occupation by the British in 1762–1763 during the Seven Years' War it had received rather liberal commercial advantages and had been governed most of the time by able, public-spirited men who had done much for its progress. Consequently during the early revolutionary years Cuba remained quiet, and was referred to by Spanish authorities as "the ever-faithful isle."

During the brief periods when the constitution of 1812 was in force (1812–1814 and 1820–1823) both the islands took advantage of the privileges it offered: they sent delegates to the Spanish Cortes and elected provincial assemblies. During this time censorship was removed and freedom of the press was permitted, with the result that liberal ideas spread rapidly. Ferdinand's repudiation of the constitution after his restoration caused resentment in both islands, and plotting for the overthrow of Spanish rule began. It was especially active in Porto Rico from 1815 to 1820, but owing to official vigilance it was always promptly suppressed. After the restoration of autocratic rule in 1823 the island remained practically free from serious political disturbances until the end of Spanish control in 1898.

The history of Cuba during this period, on the contrary, was largely made up of conspiracies, insurrections, and wars in behalf of freedom from the mother country. The difference was largely due to the attention given by other nations to Cuba because of its much greater size and economic importance and its strategic location between the Gulf of Mexico and the Caribbean. Furthermore, after 1820 the Cubans themselves were more interested in becoming free from Spain than were the inhabitants of the smaller island, partly because with Cuba's comparatively large population there was more chance of success. During much of the nineteenth century the evils of maladministration were great in both the islands, and officials were often oppressive as well as inefficient.

In the decade from 1820 to 1830 not only were conspiracies rife within Cuba, but Spain was roused and on the alert because Mexico, Colombia, the United States, France, and England were showing undue interest in the colony. The first two were exceedingly anxious to effect the freedom of the island from Spain, and repeatedly plotted invasions with this in view. The plans included emancipation of Cuba's great slave population. Most Cuban revolutionaries of the period desired annexation to either Mexico or Colombia or to the United States, and appear to have preferred the United States. As early as 1822 a number of plotters against Spanish rule sent an agent to the United States to inform the authorities that their plans were ready for a movement toward independence, and to learn whether the island would be admitted to the Union if it freed itself without American aid. But the United States government decided to keep aloof; it was merely interested in preventing, if possible, the acquisition of Cuba by any other nation. For a time American suspicion of British and French designs was very strong, and the governments of England and France watched with perhaps equal distrust the authorities at Washington. During the period a London paper referred to Cuba as the "Turkey of transatlantic politics, tottering to its fall, and kept from falling only by the struggles of those who contend for the right of catching her in her descent."[1] In the opinion of Professor J. M. Callahan the opposition of the United States and England to the activities of Cuba's two Spanish-American neighbors in the interest of freeing her probably preserved the island to Spain.

The rule of the two islands which formed the remnant of the far-flung Indies was practically foredoomed to be unwise and inefficient during the nineteenth century because of the chronic demoralization of government and politics at home; but the neighborly plottings in connection with Cuba, combined with the revolutionary conspiracies within the colony itself, doubtless served to make the lot of both islands more difficult. With the aim of preserving order and maintaining control in the island, the crown, beginning in 1825, gave the captain-general of Cuba the same authority as that exercised by Spanish governors of besieged towns; in other words, Cuba was placed under martial law and treated as if it were in a state of siege. The chief royal officer in the island was not only given general dictatorial power in most governmental matters but also specifically authorized to remove from the colony any person whatsoever whose conduct seemed suspicious or whose presence he believed to be prejudicial. The captain-general of Porto Rico was given power almost as great.

Other regulations were in harmony with the enlarged functions of the captain-general. Cubans were not admitted to the military forces of the island. Under the new arrangement all members of the town councils were appointees of the governor-general and were removable by him. Thus strict censorship, not only of the press but of all public utterances, could be maintained. A visitor to Cuba during the period stated that when a certain Italian opera was given the singers were required to substitute the word "loyalty" for "liberty." Although military and civil careers were virtually closed to all natives of the island, the latter were required to pay for the upkeep of the elaborate political machinery, for an army of Spaniards which usually numbered at least twenty-five thousand men, for a considerable navy, and for the entirely inadequate schools and other local institutions. In addition they had to send a rather large sum to Spain yearly. In consequence the taxes, especially those on commerce, were excessively high.

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[1] Quoted by James Morton Callahan in *Cuba and International Relations*, p. 140.

Extravagance was common in most departments of government, and the old corruption prevailed. It was said that no officer in Cuba was too high to take a bribe. Persistent charges were long made that the captains-general were paid for permitting the importation of slaves in violation of a treaty made with England in 1817, to go into effect three years later. In any case thousands of Africans were brought into the island annually, and, though many Cubans desired the decline of slavery, it rapidly increased.

The rank and file of the inhabitants were further demoralized by accessions from outside. French Haitians, fleeing from the wrath of their former slaves, began to arrive on a rather large scale in 1803. A little later, in consequence of the struggle for independence on the mainland and of the end of the Napoleonic wars, many other undesirables arrived. These are referred to by a Cuban historian as "lost souls—many old soldiers, thieves, vagabonds, gamblers, assassins, and seditious individuals." One of the good services remembered of the harsh captain-general Miguel Tacón, in charge of Cuba from 1834 to 1838, was his ruthless warfare against criminals, which resulted in a fairly long period of law and order.

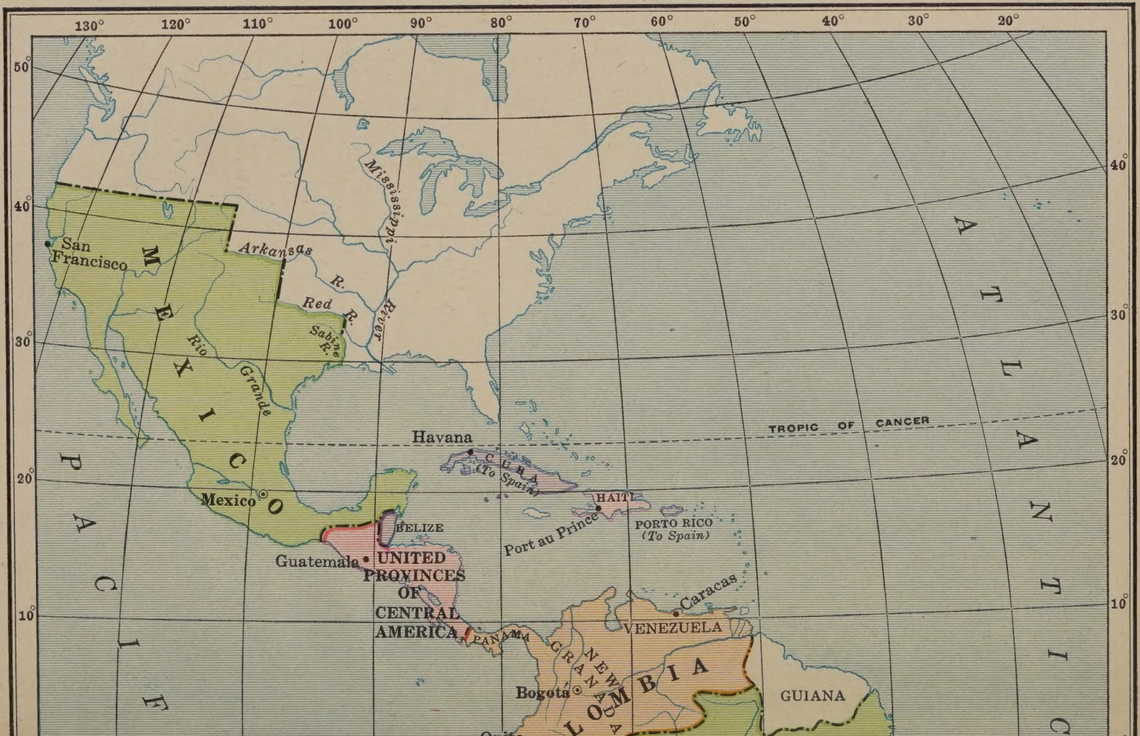
Though sugar was the leading crop, the Haitian immigrants planted coffee and stimulated its increase considerably. Most of the labor was supplied by Negro bondmen, who may have numbered more than half a million in 1860. There were also a large number of free blacks, for the policy of encouraging manumission was continued. Toward the middle of the century other laborers were secured. In the eighteen-fifties hundreds of Mayan Indians who had been in rebellion were sold in Cuba for a term of servitude by the white authorities of Yucatán, and in the same decade Chinese coolies began to be imported in large numbers.

The possession of a fairly adequate supply of cheap labor was a source of decided advantage to Cuba after 1834, when slavery was abolished in the British West Indian colonies, which had long been serious competitors with it in the sugar markets of the world; but the colony's consequent economic prosperity was not so great as it might have been, because in 1829 the Spanish government had resumed its policy of restricting Cuban trade; and the restrictions grew as time passed.

This caused new and increasing resentment in the island, as did also the fact that the colonists were shut out from the privileges granted under the Spanish constitution of 1836 on the ground that Cuba and Porto Rico were under special laws, and yet the needed special laws were not enacted. Hence clubs in the interest of independence—preferably to be followed by annexation to the United States—were formed in Cuba and New York; and in the latter place, which became a favorite refuge for exiles of the island, Cubans published annexationist newspapers.

These activities were pleasing to the slavery element in the United States, which in the eighteen-forties and eighteen-fifties played an important part in national politics, for the incorporation of the large slaveholding island into the Union would help to place the system of human bondage in a more secure position. Therefore, beginning in 1845, repeated attempts were made to purchase Cuba from Spain, but to no avail. In 1848 the Polk government was informed through diplomatic channels that the Spanish people would sooner see the island sink beneath the ocean than have it transferred to another power.

This disappointing information doubtless made a portion of the American nation more interested in the success of various filibustering expeditions against Cuba which were planned and


130°
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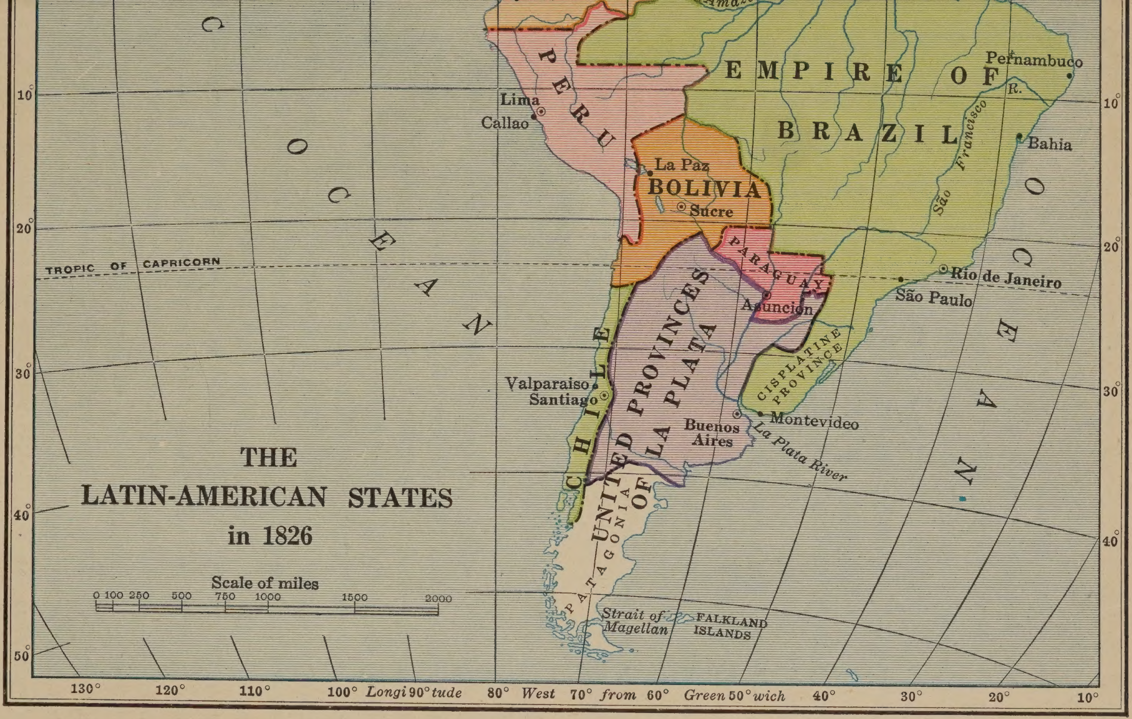
ATLANTIC
PACIF
TROPIC OF CANCER
MEXICO
San Francisco
Arkansas R.
Red R.
Sabine R.
Rio Grande
Mississippi River
Mexico
Havana
CUBA (To Spain)
HAITI
Port au Prince
PORTO RICO (To Spain)
BELIZE
Guatemala
UNITED PROVINCES OF CENTRAL AMERICA
PANAMA
Caracas
VENEZUELA
NEW GRANADA
Bogotá
COLOMBIA
GUIANA



THE LATIN-AMERICAN STATES in 1826

EMPIRE OF BRAZIL
Pernambuco
R.
São Francisco
Bahia
PERU
Lima
Callao
BOLIVIA
La Paz
Sucre
PARAGUAY
Asunción
CISPLATINE PROVINCE
Rio de Janeiro
São Paulo
Montevideo
La Plata River
Buenos Aires
UNITED PROVINCES OF LA PLATA
CHILE
Valparaiso
Santiago
PATAGONIA
Strait of Magellan
FALKLAND ISLANDS
OCEAN
OCEAN
TROPIC OF CAPRICORN
Scale of miles
0 100 250 500 750 1000 1500 2000
130° 120° 110° 100° Longi 90° tude 80° West 70° from 60° Green 50° wich 40° 30° 20° 10°
10° 20° 30° 40° 50°

equipped in the United States in the late forties and the fifties. In such activities Narciso López, a Venezuelan who had become an adopted Cuban, was a leading spirit from 1848 to 1851. López received considerable encouragement and aid from the South, for he favored annexation to the United States. A plot for a revolt, to take place in June, 1848, was discovered, and López fled to the United States. Here he organized a filibustering expedition of about six hundred men—mostly adventurers from the West and South, among them a number of officers who had served on the American side in the war with Mexico. The little army succeeded in landing in Cuba, in the spring of 1850, but the enterprise proved a failure because the inhabitants failed to rally to its support. López again retired to the United States. The following year, misled by encouraging messages from revolutionaries in Cuba, he landed there with another expedition; but he again failed to secure local support, and he and more than fifty of his men were captured by the Spanish authorities and shot.

Meanwhile the interest of the United States in Cuba became more intense and more aggressive, as was apparent after the return of the Democratic party to power in 1853. The new administration decided to force the cession of Cuba by bringing pressure for payment of a large number of monetary claims against Spain. Pierre Soulé, United States minister to Spain, was accordingly instructed by Secretary of State Marcy to confer with James Buchanan and John Mason, diplomatic representatives of the Pierce government in England and France, respectively, with the object of bringing about the desired end. The result was the rather notorious Ostend Manifesto (so called from the place of meeting), which was really the report of the conference to Marcy made public by the conferees. It urged that an attempt be again made to buy Cuba, for a sum not exceeding a hundred and twenty million dollars, and declared that, if Spain refused to sell and it became clear that her retention of the island endangered the internal peace and the existence of the United States, the latter would, "by every law, human and divine," be justified in wresting it from Spain. The diplomatic trio failed to secure the support of the administration at Washington for their bold recommendation. The document did win for Buchanan the nomination for the presidency in 1856, which was an important part of its object; but Buchanan as chief executive failed to bring Cuba under the Stars and Stripes.

Then came the election of Lincoln and the Civil War, which through the overthrow of slavery eliminated the keen desire of the South to annex Cuba. During this later period Cuban sentiment in favor of annexation to the United States gave way to a strong desire to make the island a sovereign state. Many Cubans, however, still hoped for a just government under the Spanish flag. In 1865 it appeared as if that hope might be realized, for prominent Spaniards favored a reformation of affairs in the colony, especially along economic lines. A "junta of information," made up of forty-four representatives of Porto Rico and Cuba, was created to study the situation in the two islands. The question of slavery was included; for emancipation in the United States had much increased the desire, especially among the creoles, for the ending of slavery in Cuba. Unfortunately, in 1866, after the junta had begun its sessions, a change of the Spanish ministry brought into control a group of men who were opposed to reform in the administration of the islands and were determined to stand for continued absolutism there. Consequently the labors of the junta were in vain.

A wave of deep resentment swept over the island after the commission ended its fruitless sessions in 1867. Beginning in the east, revolutionary organizations were formed in different parts; and in 1868 the bitter conflict that came to be called the Ten Years' War broke out. During this devastating struggle the sympathy of the United States was with the insurgents, and twice the authorities at Washington tried, but in vain, to induce Spain to end the war on terms favorable for Cuba. Finally, by the generous use of bribes among revolutionary leaders and by a promise to free all slaves who had taken part in the Cuban side of the war and to extend the political privileges of the islanders, the Spanish officials in 1878 brought about technical peace.

To secure the execution of the treaty of Zanjón, based upon the terms mentioned, was no easy matter. The question of emancipation was the less difficult of the two general problems, and there was no very strong governmental objection to it. In fact, in 1869, just after the war broke out, the Spanish authorities had made the general promise to emancipate. There was delay in executing the agreement, partly because of active opposition by many Spaniards in Cuba; by the close of 1881, however, laws for gradual liberation had been passed, and by the end of another five years the institution of slavery had been abolished in Cuba.

The pledge to give the island better government by making certain definite changes was executed in a tricky manner. Cubans were given the constitutional rights of Spaniards; but the concession was made empty by the provision that the governor-general, who took the place of the captain-general of the old régime, was, by a definition of his powers made in 1878, given all the authority enjoyed by the latter. For example, the governor-general appointed the Cuban members of the Spanish Cortes. Moreover there was no real reform in any department of government: the administration of justice continued corrupt and inefficient, and the taxation system remained unscientific, cumbersome, oppressive, and corrupt. Hence resentment was but little abated.

The limitations placed on trade, especially trade with the United States, still stood, a cause of irritation to both Cubans and Americans. On certain necessaries produced by the United States, such as flour, lard, boots, and calico, the duties levied in Cuban ports were excessively high if the commodities came directly from American ports, so that it was actually cheaper to ship some of these products from the United States to Spain, pay the duty there, and then take them back to Cuba, on the very threshold of the United States, than to send them directly from the point of production to Cuba. This was true of wheat flour. In addition to the tariff duties, this foreign trade was constantly further harassed and crippled by arbitrary exactions made by dishonest port officials. But American interest in Cuban commerce led to repeated negotiations by the Washington authorities with the aim of securing redress, and finally in 1884 the Spanish government agreed to remove some of the restrictions. The agreement was repeatedly violated, however, by port officials in Cuba. The good impression produced in Cuba by a reciprocity arrangement made with the United States in 1886 was soon eliminated by a marked increase in the duties charged on American goods. In 1891 the reciprocity provisions were much enlarged as a result of American negotiation and Cuban urgings. In consequence trade between the two countries increased greatly, but in 1894 the reciprocity treaty was canceled by Spain.

This fact was one of the causes for the revolution which broke out in 1895; but the Cuban people had already become tired of Spanish domination and the general hazards of what had continued to be rule from Madrid. Perhaps all of them wished at least home rule, and the majority favored complete independence. *Cuba libre!* became the battle cry of the revolutionary forces, who did not lay down their arms until Spanish power had been ended in the island. Two of the outstanding leaders in launching and pushing the war against Spain were José Martí, the poet, and Tomás Estrada Palma, who was in charge of the Cuban junta in New York City. On July 15, 1895, the revolutionaries adopted a declaration of independence from the mother country and set up a shadowy government for the "republic of Cuba."

In the struggle that followed excessive cruelty was shown on both sides. Weyler, the harsh Spanish general sent out to quell the revolt, gathered the noncombatants—women, children, and old men, to the number of perhaps four hundred thousand—into concentration camps (*reconcentrados*), and laid waste the land to prevent it from supporting the rebels. In return the rebels fired the cane plantations belonging to Spaniards. The conditions in the reconcentrados were exceedingly bad: food was lacking, sanitary considerations were entirely ignored, and the occupants died in great numbers. Popular sympathy was roused in the United States, and the American government protested to Spain. President McKinley's annual message of 1896 also hinted at intervention. But shortly afterwards the conservative ministry in Spain was replaced by liberals, resulting in the recall of Weyler, the relaxation of the concentration policy, and a promise of autonomy to Cuba. Local legislatures were granted to both the Spanish island colonies on January 1, 1898, but the governor-general remained a royal appointee. Porto Rico, which had remained quiet, was fairly contented, for it had recently received various minor economic concessions.

In Cuba, however, the political boon came too late. The revolutionaries were determined upon absolute freedom and kept on fighting. On the other hand, many Spaniards in Cuba deeply resented the grant of partial autonomy that had been made and, in recognition of the part played by the Washington authorities in bringing it about, began demonstrations against the United States and against American residents in the island. This led the American consul-general in Cuba to request that a war vessel be sent for purposes of protection, and the battleship *Maine* was ordered to Havana. Spanish-American relations were made worse by the publication on February 9, 1898, in a sensational American daily of a private letter written by Dupuy de Lome, Spanish minister at Washington. This contained uncomplimentary remarks about President McKinley. Popular excitement was stirred in the United States, and Dupuy de Lome resigned.

The climax was reached on February 15 by the blowing up of the *Maine* in Havana harbor. Two hundred and sixty men were killed. This disaster, as later investigations seemed to prove, was probably caused by an explosive on the outside of the vessel; but there is no reason to believe that it was the result of Spanish official action. Private Spaniards may have laid the explosive; but it seems more likely that unscrupulous Cubans, or even Americans, were the guilty ones, for both Cubans and Americans in Cuba were anxious for intervention by the United States. Regardless of where the blame lay, however, the destruction of the *Maine* caused hysterical excitement in the United States, where the popular view was that the vessel had been blown up by Spaniards, private individuals or officials.

American preparations for war began; and on March 27, 1898, President McKinley sent a virtual ultimatum to the Spanish government demanding that it abandon completely the reconcentrado system, agree to an armistice until October 1, and accept the United States as arbiter in the Cuban question in case peaceful settlement could not be reached between the colony and the mother country by that date. The Spanish ministry countered at first by suggesting that the question of responsibility for the *Maine* disaster be decided by arbitration, but it agreed to end the reconcentrado system. To the other demands it failed to consent; and the problem led McKinley to turn to Congress. His message to that body was completed when word came from Spain on April 10, announcing a qualified armistice, promising Cuba the Canadian type of self-government, but still pressing for arbitration of the *Maine* question.

The Spanish ministry was handicapped by the fear of overthrow if it seemed to yield too much to United States demands; but under continued pressure from Washington it probably would have yielded on all points. This was the view of General Woodford, American minister to Spain. The American authorities, however, had little faith that any promise made by the Spanish government would be kept. Furthermore, American capitalists, who had invested about fifty million dollars in Cuba, had suffered from conditions there and urged Congress to end Spanish dominion. Finally, the rank and file of the American people were roused to a crusading fervor by the war cries of their yellow press.

President McKinley, who was in a far better position than Congress to see the possibilities for a fair and peaceful settlement, unquestionably did not want war; but he was apparently too weak to stand out against a popular demand for it lest he lose party prestige. Hence, instead of revising his message to Congress in the light of the recent concessions by Spain, he merely added to the document a few lines briefly mentioning the main points of the latest communication from Madrid, and on April 11 sent the communication to Congress, which already showed a strong bent toward war.

The message favored armed intervention and left Congress to act. On April 19 that body did so by passing a joint resolution which gave the President power to use the army and navy to end Spanish rule in Cuba, but stipulated that when the island was free its "government and control" should be handed over to its people. Shortly afterwards the needless war began. Certainly Spain's blundering, oppressive administration of Cuba richly deserved retribution in the form of loss of the island; but among those whose lives were sacrificed in the war which freed the colony were not included the sovereigns and ministers responsible for the blundering and oppression.

The struggle was short, and to the world at large the outcome was certain from the first. In less than three months Spanish control was broken in the Philippines, Cuba, and Porto Rico; and on July 26, 1898, Spain signified her willingness to make peace.

In the negotiations that followed, the Spanish commissioners, anxious to insure safety for the lives and property of Spaniards in Cuba, asked that the United States annex the island; but to this the American representatives were unwilling to agree. Hence the final status of Cuba was left open as far as the treaty was concerned; but Spain relinquished all control over it and definitely ceded to the United States Porto Rico, Guam, and the Philippines, receiving twenty million dollars in payment for the Philippines. The treaty, which was signed at Paris and ratified in the spring of 1899, officially ended Spain's dominion in the Americas.

Though the war resolution of Congress promised to give Cuba independence after it had been freed from the mother country and the Spaniards had been driven out, the island was in no condition to be left to itself. The inhabitants were dying by thousands from disease and starvation, sanitation was practically nonexistent, and local government had broken down. Most of the work of reconstruction and of preparation for a sovereign status was done under the able leadership of General Leonard Wood, for two and a half years military governor under United States authority (see pages 391–394). In July, 1900, Governor Wood called an election of delegates to a constitutional convention, which assembled in Havana in November of the same year. The gathering included many leaders of the island, and, in view of its political inexperience, made fair progress, though there was lively discussion over a number of matters. One of these was the phrase "invoking the favor of God," which appeared in the draft of the preamble to the constitution. Though it met with objection, it was finally allowed to remain after an impassioned appeal from a very venerable delegate. The gathering decided that state-supported religion must go, however, and the Roman Church in Cuba became a private institution. The government provided by the constitution was a rather centralized republic, with a president and a vice president, each elected for four years, and a two-house congress. A fair amount of local autonomy was allowed, the right to elect both municipal and provincial authorities being granted; but to guard against disaster resulting from inexperience a limit was placed on the amount of debt that these political units might contract, and the president of the republic was empowered to suspend local laws temporarily for the public good. Despite the high percentage of illiteracy the constitution gave all men of the nation the right to vote.

The constitution was completed by the delegates, and signed on February 21, 1901. The United States authorities made no objection to its provisions, though they doubted the wisdom of some of them. What caused friction was an implication in the wording of General Wood's call for the election of delegates to the convention. Not only was the gathering told to form a constitution, but also to "provide for and agree with the government of the United States upon the relations to exist between that government and the government of Cuba." The constitution which the delegates considered complete on February 21, 1901, contained no mention of special relations with the United States, and the Cubans wanted none. Their desire was to secure complete independence as soon as possible; for they had felt much restiveness during the short period of control by United States authorities and had displayed deep suspicion of American good faith in the matter of freedom for the island.

Inasmuch as the convention failed to initiate a discussion of future Cuban relations with the United States, the authorities at Washington plunged in. Certain provisions, based on suggestions made by Secretary of War Elihu Root, were introduced into the Senate by O. H. Platt of Connecticut, Chairman of the Committee on Foreign Relations, as an amendment to an army appropriation bill, and were adopted as the bases of future relations between Cuba and the United States. The islanders strongly objected and sent a protesting delegation to Washington, but they were obliged to incorporate the Platt Amendment in their constitution as a price of independence. This they did on June 12, 1901. The most important stipulations of the amendment were that the Cuban government make no treaties with foreign powers impairing the island's independence; that it contract no debt which could not be met by the ordinary revenues of the country; that it maintain and extend sanitation in the cities; that it consent to the intervention of the United States for the preservation of independence and orderly government in Cuba; and that it sell or lease to the United States lands for coaling or naval stations.

The amendment accepted, the way was clear to take the last steps toward Cuban independence. In December, 1901, the first elections under the new constitution were held for local governors, members of congress, vice president, and president. Tomás Estrada Palma, already mentioned as one of the chief leaders of the final movement for independence from Spain, was chosen chief executive; and on May 20, 1902, General Wood turned over to him the reins of Cuban government. *Cuba libre* was a reality.

XV

PROBLEMS OF INDEPENDENCE

Whatever the plans of theorists and the exhortations of the wise, every people comes sooner or later to that kind of government which the facts demand.

JAMES BRYCE, *Modern Democracies*, Vol. I, p. 204

ACHIEVEMENT of independence by the American colonies of France, Portugal, and Spain brought new problems to the weak and inexperienced states that arose from the wreckage of these colonies. One of the earliest and most pressing of the problems was the preservation of the dearly bought freedom. Fears of reconquest haunted many of the young states for a considerable time and influenced their policies; but eventually a feeling of security against attacks by the mother countries was gained. A more persistent problem, and one far more difficult than the winning and retaining of independence, was how to use wisely (especially in a political way) the powers inherent in the sovereign status attained. Each of the twenty Latin-American states—from Haiti, the first to arise, to Panama, which unfurled its national flag one hundred years later—has struggled bitterly with the task of government, and some of them have not yet learned how to perform it.

RECOGNITION AND THE MONROE DOCTRINE

In their relations with the mother country after the termination of hostilities in behalf of freedom the Latin-American states were, with the exception of Cuba, far less fortunate than the United States. By the treaty of 1783, which ended the Revolutionary War of the thirteen colonies against England, the latter gave the independence of her former colonies a definite recognition, which constituted a pledge against further attempts at coercion and subjection. The American states that asserted their sovereignty during the first quarter of the nineteenth century had no such assurance.

There was some delay before Portugal acknowledged the independence of Brazil. France refused all recognition of Haiti except at the price of economic slavery; and for a generation the little state lived in terror of reconquest. Technically, the Spanish-American states were in the same position as Haiti, but they were in less danger owing to the weakness of the mother country and their own potential strength, through union, for defense. Pride would not permit Spain to acknowledge the plain fact that her colonies had won their freedom by force of arms, and not until fifteen years after the wars for independence had ended did she make her first official admission that any of them was sovereign. The first such admission in the case of any American state was the sending of Ángel Calderón de la Barca as Spanish minister to Mexico in 1839. Some of the Spanish-American countries had flown the flags of freedom for about half a century before their long-bereaved mother country formally acknowledged their right to do so.

In view of the irreconcilable attitude of Spain the good will of other nations was of special importance. Most of the revolutionary governments coming into existence in 1810 hoped for early recognition and aid from the United States and England, and some of them promptly sought it. The first move toward this end came from the junta of Venezuela, which, on July 24, 1811, less than three weeks after independence was declared, appointed a special agent to the United States, instructed to ask for recognition of the independence of the "United Provinces of Venezuela." In the following November the Venezuelan representative, Orea, had a conference with Secretary of State Monroe, to whom he presented a copy of his country's declaration of independence, expressing the hope for recognition.

This event excited in the United States new interest in the revolutionary movements in Latin America, and brought forth expressions of friendliness and sympathy for the struggling colonies that were hardly in conformity with strict neutrality; but the surrender of Miranda and the collapse of the revolution in Venezuela within a year after Orea's appointment removed for the time all possibility of recognition. When serious fighting against Spain broke out a few years later, the United States government made a conscientious effort to preserve neutrality in the face of general popular sympathy for the insurgents; nevertheless, it soon sent agents to some of the Spanish-American states to watch developments.

Henry Clay, influential in the House of Representatives, was the outstanding champion of the struggling embryonic states, and urged their recognition. The cautious and long-sighted John Quincy Adams, Secretary of State under President Monroe, opposed it for a time, partly because of uncertainty as to how the great powers of Europe—reported in 1818 to be planning mediation between Spain and her colonies—would regard the move, but more for the reason that he did not wish to jeopardize the negotiations for purchase of Florida, then going on with Spain. By 1822, however, Florida was an American possession, and various revolted colonies had demonstrated their ability to hold their own in encounters with Spanish troops. Then Monroe set about preparing for recognition by suggesting on March 22 of that year that an appropriation be voted for sending diplomatic agents to such of the new states as might seem to be entitled to recognition. Two months later he officially received Manuel Torres, official agent of Colombia, making that country the first to receive recognition.

Within the next three or four years diplomatic relations had been established by the United States with the strongest countries of Spanish America, and also with Brazil, whose chargé d'affaires was received by Monroe in May, 1824. Great Britain was the first of the old powers to follow this lead; she began by recognizing Argentina in 1825. One after another the other nations of Europe slowly extended recognition to Brazil and the Spanish-American states. Haiti, however, because of its laws discriminating against whites and its demoralized internal conditions, combined with the unwillingness of other governments to offend France, remained for some decades quite unrecognized by any foreign power—an outcast among the nations.

The new Spanish-American states, however, needed something more than recognition by two or three liberal and friendly governments to give them feelings of security, especially since rumors that some of the reactionary powers of Europe aimed to help Spain to recover her colonies began to circulate even before the United States government received Colombia's diplomatic agent in 1822. In fact, shortly after its formation in 1815 the so-called "Holy Alliance," in which Russia, Prussia, and Austria were the leading spirits, expressed general disapproval of revolutions. By 1820, when uprisings took place in Naples and Spain, these three states had become more reactionary, and at the congress held at Troppau in the fall of that year they agreed to refuse recognition to states originating from revolution and to intervene to restore conditions upset by it. They proposed to apply these principles to Spain's wayward colonies.

England, because of her greater political liberalism and because of the fact that she had developed a very prosperous trade with the new Spanish-American states, was much opposed to the program and soon withdrew from the alliance; but the reactionaries took initial steps toward carrying out their intent, and in 1823 France, under their authorization, sent into Spain an army which restored the weak Ferdinand to his despotic rule. England strongly protested against this action, and the United States regarded the proceedings with a disapproving eye.

For some years, in fact, the Washington government had viewed with suspicious anticipation the attitude of the conservative European states toward Spain's revolted colonies. Mediation had been suggested as early as 1817 at a congress of European powers, and in 1818 a report reached the United States that mediation was actually under way. This was not the case; but Secretary of State Adams accepted the statement as true and took steps to make known the attitude of his government on the subject. On May 20, 1818, he instructed Albert Gallatin, the American minister to France, that when opportunity offered he was to notify Richelieu informally that the

United States could "neither accede to nor approve of any interference to restore any part of Spanish supremacy in any of the South American provinces." Here was the immediate forerunner of the Monroe Doctrine, which was formally proclaimed five and a half years later. A similar instruction was sent to the American representative at St. Petersburg.

England's frank opposition to the designs of the conservative powers in regard to the infant Spanish-American states developed in the United States a temporary cordiality toward that country, and caused John Quincy Adams to hint at willingness on the part of his government to coöperate with Great Britain in carrying out their common ideas regarding the matter. The result was a suggestion made in August, 1823, by George Canning, British foreign secretary, to Richard Rush, the American minister, that their countries act jointly to avert the threatened intervention by the conservative powers to restore Spain's colonies. Rush, who was without instructions that would cover the situation, reported the matter to Washington, but indicated to Canning the general attitude of his government toward the question and spoke especially of its opposition to the congress recently proposed by the Continental powers for discussion of Spanish-American affairs. The United States, he hinted, might consent to joint action if Great Britain would recognize the independence of the new American states. Canning did not at the time feel in a position to accept the implied terms, but soon afterwards he again urged joint action, thereby causing Rush to point out his country's policy of avoiding entangling alliances.

This reply did not induce Canning to give up hope of getting the United States to act jointly with Great Britain, but he apparently decided that the danger to the weak Spanish-American states called for some immediate action. Therefore he turned to Prince de Polignac, the French ambassador to London, and in a memorandum of October 9 gave a broad hint of British opposition to the "junction of any Foreign Power in an enterprise of Spain against the Colonies." Polignac, instructed by his government, agreed with the British view that it was hopeless to attempt to restore Spanish America to its colonial status, and declared that France "abjured . . . any design of acting against the Colonies by force of arms." The French government soon informed the other powers of the British attitude, and the hint was not lost on them.

Meanwhile Canning's proposal to Rush had become a subject of discussion by the American government. Monroe consulted ex-Presidents Jefferson and Madison as well as the members of his cabinet, and for a time, under the influence of his two predecessors in office, he favored joint action with Great Britain in taking a public stand on the Spanish-American question. Adams, ever jealous for the dignity and prestige of his country, held out for independent action and soon won Monroe to this policy. The Secretary of State also opposed including in the proposed declaration any criticism of such reactionary activities as were limited to Europe, and again he had his way. His aim was to "make an American cause." The fact that by a ukase issued in 1821 Russia had virtually declared a monopoly of the Pacific coast north of the fifty-first parallel seemed to him to call for attention in any warning issued against European designs in the Western Hemisphere.

The American pronouncement, which soon came to be called the Monroe Doctrine, was proclaimed to the world as a part of the President's annual message of December 2, 1823. It avowed the policy of the United States to avoid participation in conflicts of European powers over matters relating only to such powers, and pointed out that the political system of the allied European powers was very different from the system the United States had gained at the expense of much blood and treasure, and that the United States would hence regard any attempt to extend that European system to any part of the Western Hemisphere as dangerous to American peace and safety. With the existing European colonies and dependencies in the New World the United States had not interfered and did not intend to interfere, but with the governments which had declared and maintained their independence, and had been so recognized by the United States, any interference by European powers for the purpose of oppressing and controlling their destiny could not be viewed in any other light than as the "manifestation of an unfriendly disposition toward the United States."

As was to be expected, the Monroe Doctrine met with greatly varied receptions. On the European continent it roused indignant denunciation, and was referred to by Prince Metternich as an "indecent declaration"; but it was hardly to be expected that the scheming reactionaries would greet it with enthusiasm. The English nation gave it a friendly welcome; but Canning received it with mixed emotions, for the American government had stolen a march on him by issuing a warning, against interference with New World nations, that obviously included Great Britain as well as the Continental powers.

In the new Latin-American states the Monroe Doctrine made no such marked impression as people of the United States are prone to think, but on the whole it was accepted with satisfaction and pleasure. Little mention was made of it in Mexico or Central America; but Francisco Santander,—vice president of Colombia in charge of the government during the absence of Bolívar in the war,—who was very friendly toward the United States, declared it "a policy consolatory to human nature." Monroe's message was apparently very well received in Chile, but in Argentina the satisfaction was rather qualified. Bolívar, who seems to have been in Peru when he received word of it, appears to have paid very little attention to the pronouncement from Washington, for he looked to England for aid and support rather than to the young United States. The same attitude was taken by most Latin-American leaders of the time, and this was very natural, since England was queen of the seas. Obviously the disapproval expressed by Canning to Polignac as to the designs of the Holy Alliance regarding Spain's revolted colonies did much more to avert any danger of intervention that may have existed than did Monroe's message, which came out two months later. The importance of the doctrine set forth by Monroe in December, 1823, came not from its early effect but from its adoption as a permanent basic principle of the foreign policy of the United States.

Through Monroe's declaration was designed particularly as a protection to Spain's former colonies, it attracted unusual attention in Haiti and Brazil. In Haiti (still unrecognized by the United States) the newspaper *Le Propagateur* published an article which, while it praised Monroe's policy, vigorously protested against his failure to mention Haiti in his message, and concluded by urging its recognition by the government at Washington. In Brazil the reaction was more diplomatic and practical, and was unique among the Latin-American nations. The empire had not as yet been recognized by either Portugal or the United States, and was not included in Monroe's message. But Luiz J. de Carvalho e Mello, the minister of foreign affairs under Pedro I, decided to make a strong move for recognition and to take the attitude that Brazil was included in the protective policy proclaimed by the United States; for if the Holy Alliance actually set about restoring Spain's colonies, it might easily be induced to do the same for Portugal.

PLANS FOR PROTECTIVE ALLIANCES

Accordingly, very promptly after Monroe's message had been received, José Silvestre Rebello was appointed chargé d'affaires to the United States with instructions to try to secure recognition of Brazil's independence and also to suggest to the United States an offensive and defensive alliance on the general principle of mutual benefits. After a brief delay following his arrival in Washington, Rebello was received officially on May 26, 1824, and thus recognition was accomplished. With reference to his other special task he lost no time, and on the occasion of his reception he advanced the idea of "a concert of American powers to sustain the general system of American independence." Later he put the suggestion in writing at Adams's request, and in this communication referred to the Monroe Doctrine as applying to Brazil. On the ground that the United States, in protecting his country from European powers, would have to sacrifice men and money, Rebello proposed the alliance as instructed, declaring that it was "not in accordance with reason, justice, and right that the government of Brazil should receive such services gratuitously." If the United States were willing, he added, the new Spanish-American states might be invited to become members of the alliance. Nothing came of the proposal, for after a time Rebello was definitely told that such an alliance would be contrary to American policy. But Carvalho e Mello's plan is of interest as being the first suggestion that the Monroe Doctrine be made bilateral and mutual rather than unilateral, and as being a definite effort to put the idea into effect.

Others had preceded the Brazilian statesman, however, in suggesting that strength and security be gained in the Western Hemisphere by coöperative union. Miranda very early planned a confederation of Spain's American colonies. In 1811 Juan Egaña, a revolutionary leader of Chile, drew up a declaration of rights in which he proposed that a congress of independent American states be called with the idea of federation. Simón Bolívar, however, was the most famous as an advocate of the plan, which he had in mind at least as early as 1815 as a means of protecting the states that he expected would arise on the ruins of Spain's Indies. As president of Colombia he sent communications to a number of the new Spanish-American countries in 1822, inviting them to prepare for participation in a congress to be held in Panama. His idea was to have each state bound to the others by treaties of alliance and confederation before the international gathering should take place on the Isthmus. Consequently, in behalf of Colombia he had such treaties made with Mexico and Peru. In December, 1824, he issued specific invitations to the Spanish-American states to attend the congress, though it was apparent that they had done little by way of preparation for it. Santander supplemented Bolívar's action by inviting Brazil, the United States, and Great Britain. He felt that the presence of delegates from the last two would be a source of guidance and would help to insure the success of the convention. Haiti was not asked to participate. The meeting was set for the summer of 1826.

It is well known to students of United States history that owing to factional opposition in Congress there was much delay in appointing the United States delegates to the gathering. One of the two who were appointed died on the way to Panama, and by the time the other reached the Isthmus the congress had adjourned to meet at Tacubaya, Mexico; the adjourned meeting, however, failed to take place. Inasmuch as the politicians at Buenos Aires were jealous of the leading part Colombia was playing in South America, they declined the invitation, as did also the dictator of Paraguay, in harmony with his policy of isolation. The other states accepted, and chose representatives to the gathering, but some of these arrived too late. Of the Latin-American countries only Mexico, Central America, Colombia, and Peru had delegates in attendance. The only other country officially represented was Great Britain.

It had been Bolívar's plan to form at the congress a league of nations, with a central tribunal for the settlement of disputes and with a defensive army of at least a hundred thousand men. Bases for general confederation, together with detailed provisions, were presented by the Peruvian delegates, but these met with opposition from the Colombians present, who feared domination by a superstate. Four conventions were adopted by the congress. One of these provided for "union, league, and perpetual confederation" of the states represented; another, for the arbitration of all boundary disputes, the decisions of the arbitral tribunal to be enforced by the army of the confederation. The only government to ratify the agreements was that of Colombia. As far as immediate results were concerned the congress was a failure; but it established a definite precedent for later inter-American gatherings.

THE PROBLEM OF SELF-GOVERNMENT

One of the chief factors preventing the success of the congress of which Bolívar had so long dreamed was the demoralized conditions existing throughout Spanish America, which Brazil, through adoption of a monarchical form of government, to a considerable extent avoided. To understand the unusual difficulties which confronted the leaders in the new states, it is necessary first to consider the equipment with which these countries started upon their national careers.

The population as a whole was probably at least 95 per cent illiterate. The creoles and mestizos, who now formed the dominating class, were but a small fraction of the total population; a genuine middle class, which would have formed a balance wheel for the new society, was almost completely lacking; and the overwhelmingly large lowest ranks of the population were made up of Negroes, aborigines, and mixed-bloods, all densely ignorant and dominated by the superstitions of paganism or of a degenerate Roman Catholicism. The creole minority, on the other hand, were in many cases influenced by the extravagances of the French revolutionary philosophy and opposed the Church as a misleading and oppressive institution. Though this view was extreme, it was somewhat justified, as has already been indicated (see pages 189–192); for by this time the interests of the Church were largely material: neither by precept nor by example did it offer much inspiration to right living. This was a tragic lack, for the population was badly demoralized by the vicious colonial government and the long struggles for independence and needed the steadying influence that an uncorrupted clergy might have given. The dominant class tended, furthermore, to be theoretical and imaginative, emotional and hot-headed, rather than thoughtful, self-controlled, and practical. The old Spanish contempt for labor persisted among the higher ranks, and the masses of former workers had to some extent formed habits of idleness through army life. Yet labor was needed to restore agriculture and industry, which had been demoralized by war, and to make possible the replenishing of empty treasuries.

In civic education the population was well-nigh completely lacking. It will be recalled that with the exception of the cabildos no element of self-government was found in the colonies, and by the dawn of independence these town councils had almost all become self-perpetuating bodies. There was no helpful tradition of self-government from the mother country to be used as a political anchorage. In 1810 Spain and Portugal were still almost as lacking in political democracy as England had been six hundred years before, when Magna Carta was won from King John. Practically all the outstanding leaders in the struggle for independence realized that the newly emancipated colonies were unprepared for democratic rule, and many so expressed themselves years before independence was achieved; for much discussion of the political needs of the future states took place, and some serious study of the problem, when these states were little more than a dream. In Peru the problem was discussed with unusual interest by the Sociedad Patriótica de Lima, organized in January, 1822, with Bernardo Monteagudo, minister of foreign affairs under San Martín, as president and leading spirit. A dozen years before, when an important contributor to Mariano Moreno's *Gaceta de Buenos Aires*, Monteagudo had been an ardent democrat; but his observation of the growing political confusion in Spanish America, and the fact that little Switzerland was the only republic left in Europe after the reconstruction that followed Napoleon's final elimination, made him feel that monarchy was the more permanent form of government and was more suited to young countries. He regarded the United States of America as still only an experiment in republicanism.

Many other leaders, including Belgrano of Buenos Aires, O'Higgins of Chile, and San Martín, favored a monarchical form of government for the Spanish-American states, for they felt that the population was quite unprepared for any more experimental and liberal system. After General San Martín's arrival in Peru, he declared in a letter to the viceroy that Spanish America was powerless to erect itself into an independent republic because it lacked "virtues and civilization." In view of this, he wrote, he had agreed with the men of his army to crown a Spanish prince as ruler; in fact, the plan to place one or more Spanish Bourbon *infantes* in control of the emancipated colonies was for a time given serious thought in various parts of America and was favored by France. As already stated, this idea was included in the Mexican plan of Iguala. But in all cases the intention was to have the royal power limited by a constitution.

Opposed to this school of thinkers were various leaders who felt that the monarchical system was unsuited to America. Yet most of these realized that the population of Spain's former colonies was too generally ignorant and politically inexperienced to undertake self-government. Hence they favored what virtually amounted to dictatorship. This idea was expressed in one way or another by Francisco Miranda, Diego Portales of Chile, and Bolívar himself. Early in 1822 Portales wrote to a friend, "Democracy, regarding which visionaries do so much shouting, is an absurdity in countries like the [Spanish] American ones, full of vices and where the citizens lack all the virtues necessary to establish a true republic." What he desired for his country was a strongly centralized government—called a republic—headed by men who should be "true models of virtue and patriotism" and who should gradually prepare the population for completely liberal, free government. Although Bolívar was a great admirer of the political system of the United States of America, which he thought "so sublime as to be suitable for a republic of saints," nevertheless he fully recognized that the population of that country had had such a rare training as made them "unique in the history of the human race." The former Spanish colonies, he declared, were by no means ready for a federal government, and he uttered repeated warnings when he saw a tendency to regard the Constitution of the United States as a model for the new governments to be set up in South America. The need there, he believed, was for paternalism and dictatorship rather than for democracy and federalism; and his convictions, as a result of sad experience, grew stronger with the passing of the years. In 1829, not long before his death, he wrote a friend, "To my mind it would be better for [Spanish] America to adopt the Koran than the government of the United States, although it is the best in the world."[1] When San Martín and Bolívar met at Guayaquil in 1822 to discuss the future of Spanish America, the monarchical and dictatorial schools came squarely into conflict; San Martín's withdrawal from leadership greatly weakened the former and stimulated and strengthened the latter, and the latter prevailed.

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[1] Quoted in William R. Shepherd's article "Bolívar and the United States," *Hispanic-American Historical Review* (August, 1918), p. 287.

Yet the new states as a whole were destined to start upon their independent careers without even the uncertain assurance of stability and progress offered by strong, orderly dictatorships veiled as republics. In most of the capitals the less intelligent and less experienced creoles and mestizos became interested in the political problem as actual independence approached, and often made their influence felt in favor of popular government. Consequently most of the states drew up liberal republican constitutions based upon that of the United States or that of the defunct French Republic. Nearly all these documents included noble bills of rights pledging freedom of speech and of the press, and related liberties; and most of them, or laws quickly enacted in harmony with them, decreed the abolition of the Inquisition and of human slavery.

The more radical leaders who gained control in many places tried, as the Argentine critic Agustín Álvarez put it, to secure political well-being by the means used to gain moral well-being —by ritualism. Such words as "liberty," "democracy," and "federalism" were given a sacramental significance and were of themselves expected to work a charm and bring about an ideal government. What the amateur politicians really attempted was the impossible feat of leaping from political medievalism to modern democracy. They failed utterly, as was to be expected. "The constitutions," says James Bryce, "did not suit the facts, and the facts had to prevail against the constitutions, sometimes against their letter, usually against their spirit."[1]

Moreover, the very existence in the constitutions of much that was impractical led to disrespect and disregard for many provisions that might have been put into effect. Lawlessness increased, and the rickety political machinery was usually unable to combat it.

Although without civic education, members of upper-class Latin-American society were intensely interested in politics because of the potential spoils of office. The attitude prevailing in the colonial period in this regard was aggravated under independence, since many felt that aid from the public treasury was due them for their services toward freeing the country from Spain. Hence government was more than ever looked upon as existing for the sake of the officeholder, his family, and his friends, rather than for the general welfare; office-getting and office-holding—often characterized by corruption and inefficiency—became the favorite activity of ambitious Latin-American men. Administration commonly meant *mal*administration; and this was perhaps more often caused by lack of character on the part of officers than by their lack of experience. Plenty of leaders were to be found who, when moved by patriotic fervor, were ready to die for their country, but those willing to live and work patiently and conscientiously in the interest of national well-being were few indeed.

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[1] *South America: Observations and Impressions*, p. 539.

Most unfortunate of all for Spanish-American republicanism, in consequence of the long struggle for independence the people as a whole, though otherwise ignorant, were well trained in warfare and had developed a militaristic psychology. They had come to regard deadly weapons as the natural arbiters of disputes, both public and private. Trained political leaders were entirely lacking; but skilled military chieftains existed in abundance, and for a long time most of the aspirants to high governmental office came from among them. By means of lavish promises it was not difficult for these *caudillos*, as the soldier-politicians were called, to secure a following from the ignorant, poverty-stricken masses. The candidate for office headed an army rather than a political party, bullets took the place of ballots, and a military victory was the equivalent of an election.

Under the name of president, protector, dictator, or some such title, the winner in the contest held control of the state as long as he was backed by a superior military following, actual or potential, and usurped most of the powers of the legislative and judicial branches of the government. Though congresses and courts existed, they were usually merely the tools of the military despot in the executive's chair. But when the office-hungry opposition, made up of all the ambitious "outs," gained more strength than the incumbent possessed, a change of office took place by means of a revolution. A common preliminary to such a movement was the bribing of garrisons in the capital to turn against the caudillo-executive. Ordinarily the revolt was signalized by the issuing of a *pronunciamiento*, or manifesto, containing bitter charges against the existing authorities and fair promises of reform. If the uprising brought about the overthrow of the government, very often the leaders among the victors fell to quarreling among themselves over the political spoils, especially over the office of president. Then anarchic disorder reigned until one of the ambitious chieftains gained the military advantage and the coveted headship of the state. Thus there was early established in all the states what long existed in many—a political vicious circle made up of revolution, anarchy, and dictatorship.

Elections were regularly held in many of the countries, often under the most autocratic of dictators; but usually they were the worst of farces: no attempt was made to get an honest expression of the popular will or to canvass the election returns. The incumbent caudillo, who had control of all the election machinery, merely announced the reëlection of himself and his friends. In view of such procedure revolutions were a better indication of the popular will than balloting, and often they were the only means of bringing about a change in government. On the other hand, even after the fairly honest elections which on rare occasions took place, the defeated element commonly flew to arms. This was partly caused by a conviction that fraud had been practiced (a natural distrust based upon long experience), but also often by the fact that the Spanish-Americans were poor sports and poor losers. Their pride caused them to look upon defeat as a personal affront; they did not know how to accept an unfavorable vote and congratulate the winning side. This lack of good sportsmanship is apparent from the fact that incumbent presidents, who could control the election, in some instances revolted against the decision of the ballot when, in rare cases, this proved adverse to them because of too much self-confidence on their part regarding the outcome.

Commonly these revolutionary elections—and also military uprisings, in general—were followed by bitter retaliation on the losers. Leaders of the defeated side were sometimes put to death, but more often they were imprisoned or exiled by hundreds, and all action against them was accompanied by confiscation of property.

What has been said here gives the worst aspect of Latin-American politics in the century since independence. It must be added that occasionally a man of true patriotic devotion and real ability became dictator and gave opportunity for temporary progress to the state thus favored by fortune. Furthermore, the revolutionary struggles and civil wars were often, in a rough, blundering sort of way, something more and better than mere selfish struggles for the spoils of office on the part of caudillos supported by an ignorant, misguided army of the humble, who had little or nothing to lose and grasped for a chance of gain. The most general and bloody of the conflicts, in particular, often showed an alignment of classes and groups who were trying, in the absence of better means, to reach a settlement of their differences. Thus, federalists fought against centralists; the anti-clericals lined up against the supporters of the Roman Church; those who favored foreign influence were opposed to those who feared it; the landless peones made war upon the aristocracy possessed of vast estates; and the generally downtrodden masses came into conflict with the governing classes.

Frequently the factions took their names from their politico-military leaders, calling themselves *Horacistas*, *Zapatistas*, and so on; but descriptive political names were likewise used, especially the terms "liberals" and "conservatives." The former, who were long influenced by the French revolutionary teachings, usually opposed foreign influence and clericalism in politics and favored a federal form of government with considerable popular control. The latter, on the other hand, stood for a strong, privileged, state-supported Church, greater friendliness to foreign nations, and an aristocratic, centralist political system. To the liberals commonly belonged the commercial element and the professional, except the clergy; to the conservatives belonged the clergy and the large ranchers and planters; the ignorant masses (except where the Church influenced their decisions) generally backed the leaders who offered the best promises of war booty or of relief from oppression.

By means of these bitter factional struggles numerous important political questions were settled in Latin America; but the costs were very great, directly through expenditure of life and money and destruction of property in the conflicts themselves, and indirectly through the moral, social, and economic degeneration which are the inevitable by-products and aftermaths of warfare. Moreover, the unhappy nations were left alone to stew in the juice of their own inefficiency and poverty; for immigration and foreign capital avoid lands where life and property are not safe.

Some of the disasters and woes of the young states might have been avoided if frank dictatorships of an orderly, long-term sort had been established at the outset or if the plan to place Spanish princes on Spanish-American thrones had been carried out; but the results would really have been dependent upon the characters and abilities of the dictators and princes. Brazil was spared much of the political misfortune which befell Spanish America in the nineteenth century; but this was owing to the man who during most of the imperial period was sovereign of the land rather than to the form of government adopted. And it is well to note in this connection that, in spite of the hereditary monarchy under which Spain and Portugal were generally ruled, during the period in question they were afflicted with more political ills than befell some of the Spanish-American states.

Yet even the most fortunate of these had their periods of political turbulence. Some that started out with the greatest handicaps experienced as many as sixty or seventy military disturbances in a century of existence, and even yet they have not emerged from the caudillo stage of political development. Others have long been safely beyond it, with stable governments served by civil executives, and have made good progress. The chief influence toward this political advancement has been economic development. During the intervals between revolutionary upheavals and civil conflicts men of influence in some cases accumulated considerable property by settling down and forming habits of industry, and they came to realize through personal experience that warfare and unstable government were opposed to prosperity. Since they did not want their herds driven off to feed soldiers, their plantations burned, and their laborers conscripted for the armies, they began to take a firm stand against revolution and to demand peace and order and at least the letter of constitutional government. Ballots were therefore preferred to bullets for effecting governmental changes in some states, long dictatorships ended, and the victorious general gave place to the civilian as chief executive of the nation.

Though fraud and coercion were commonly practiced at elections in these states, the very fact that governmental changes were effected without violence marked an important step in advance; for the establishment of peace and order encouraged immigration and foreign capital, both badly needed for the economic development of the country—a development without which there could be no essential progress in other respects. The immigrants went to meet the demands for labor, the capital became the basis for large industrial enterprises, and both usually made for governmental improvement. In many cases the laborers were from lands having better political traditions than those to which they came, and foreigners who had invested fortunes in large undertakings used their influence to prevent such disorders as would bring ruin. The greater prosperity which came with peace made educational progress possible, and with it came the beginning of an understanding of republican principles. This increased political intelligence was gradually reflected in governmental practice, and especially showed itself in the yielding up of some of the executive's power. Thus more strength and independence came to the legislative and judicial departments of government; but the president tended to maintain a strong position, even a dominant one, and this prevented the establishment of a balance between the three branches of government.

XVI

HAITI

Frères, nous avons tous brisé le joug infâme
 Qui, trop longtemps, courba nos fronts;
Jaunes et noirs, brûlant d'une héroïque flamme,
 Nous avons vengé nos affronts;

Et le Dieu juste et fort couronnant notre audace,
 Noir ou jaune, à l'égal du blanc,
A pu se dire enfin: "J'ai créé pour ma race
 Une patrie avec mon sang."

Pierre Faubert, "Aux Haïtiens"

THOUGH it is a great misfortune for an individual to have a bad start in life, such a handicap is infinitely worse for a nation. Probably no people ever launched upon a separate political career under more serious disadvantages than the Haitians. When the national declaration of independence was adopted by Haiti on January 1, 1804, the once dominant whites had been eliminated, except for a few friendly individuals, and the mulatto freedmen of the colonial era had been much reduced in numbers. The population was almost wholly composed of Negro ex-slaves, a considerable fraction of whom had been born in the jungles of Africa.

The full potentialities of the Ethiopian race for progress were not known when Haiti became free from France, nor are they yet; but the backwardness and ignorance of the country's population were obvious, and this caused other peoples to look down upon the Negro state. On the other hand, the want of knowledge and experience on the part of the Haitians caused them to believe that their defeat of the French proved them equal to other nations if not superior to them; hence they took the childish view that the world had little to teach them, and were inclined to isolate themselves from it. This policy of aloofness was further encouraged by the constant fear of reënslavement. In an effort to guard against this calamity, the leaders discouraged the immigration of whites by laws preventing them from becoming citizens or owning land. Consequently very few whites entered the country, which was thus deprived of aid toward progress. Even more did the Haitians fear reconquest by France, and therefore they maintained a disproportionately large army, thereby fostering militarism in politics and idleness in the men of the population. In fact, there was throughout the country a general tendency to work as little as possible; this was natural in a people just escaped from servitude. Yet the fertile land was largely devastated, and the country was an economic wreck; if progress was to take place and civilization to be achieved, the nation must labor.

Naturally many of the leaders had some savage traits, and more of them made grotesque blunders; but the majority of those in the first fifty or sixty years of independence probably showed as much wisdom and altruism in their rule as many of the Spanish-American political leaders in the same period. Dessalines, the first head of the state, an illiterate, born in slavery, appears to have worked for the general good. For a short time after the proclamation of independence he ruled as governor-general; but when word arrived that Napoleon Bonaparte had been crowned emperor, the Haitians, who, with the aid of yellow fever, had defeated the great Napoleon's armies, were fired with a desire to have a ruler of equal rank. Dessalines was very willing to please in this regard. Hence in October, 1804, he was crowned Jacques I, emperor of Haiti; but, fearful of the rise of a black privileged class which might oppress the remainder of the population, he opposed the creation of a peerage, declaring, "I am the only noble in Haiti." Under his leadership a machinery of government was formed and set going with military leaders mainly in control. Among the numerous decrees issued at the start were some important ones of economic character. Almost all titles of the whites to the lands which they had held before they fled for their lives were annulled. Upon these estates the ex-slaves had settled in large numbers, and there was much confusion as to ownership. The emperor therefore ordered a survey for the establishment of titles. For the purpose of starting the nation toward economic progress he also decreed forced agricultural labor by all people not having trades or other occupations. This caused much resentment, as did other rather drastic measures of Dessalines; the result was a revolt in which he was killed two years after his coronation.

A period of warfare followed between two aspirants to power, finally ending in a division of the country between them. In the south a nominal republic was set up headed by Alexandre Pétion, who was made president for life; in the north Henri Christophe ruled as King Henri I. Constitutions were adopted for both little states, but since their provisions were largely ignored they were of slight importance. Pétion, who had been educated in France, was mild and easy-going and let the people live in the idleness which tropical nature permitted. Meanwhile the government became undermined by corruption. "All men are robbers," the president remarked philosophically, when he was informed that public money was disappearing into private pockets. As a result of official dishonesty and national laziness, money was soon lacking for current government expenses, and Pétion made matters worse by issuing large amounts of debased silver coin and worthless paper currency. To add to the demoralization, the Haitian republic was harassed by Henri I of the Haitian kingdom and by internal dissension and civil war. Despite his indolence and the run-down condition of his country, Pétion heartily welcomed Simón Bolívar when he arrived as a fugitive late in 1815, and supplied him with arms and ammunition, exacting in return the promise that Bolívar would abolish slavery in the lands which he might free from Spanish control. Three years later Pétion died of fever.

Unlike his southern neighbor, Henri Christophe ruled with a rod of iron. Following the lead of Toussaint L'Ouverture and Dessalines, he forced the population to labor. Squads were sent into the fields under command of soldiers, and Henri personally made frequent tours through the country to see that his decrees were obeyed. As a result of his energetic measures agriculture and commerce flourished, and the public income was so great as to enable the king to build a number of handsome palaces for himself. The ruins of Sans Souci, his favorite residence, at his capital, Cap Haitien, are still a wonder to tourists. He also created numerous nobles to grace his court, two of whom, the counts of Lemonade and Marmalade, have been a source of amusement to some later writers not aware that political units with these names existed under the French régime. Henri's compulsory-labor laws were but a part of a rather remarkable code providing for a form of paternalistic socialism. There were many benevolent features, such as provision for medical care for the workers and food for the sick and old; but unfortunately most of the altruistic decrees remained dead letters, whereas the harsh ones were enforced with increasing strictness. In fact, Christophe became more exacting and cruel as time passed, until finally there came general revolt. Realizing that the end of his rule was at hand, he committed suicide in 1820.

At this time southern Haiti was in control of a mulatto, Jean Pierre Boyer, who, in accordance with the constitution, had been named by Pétion as his successor. Within a few months Boyer brought the former realm of Christophe under his rule; and, as has already been stated, in 1822 he likewise conquered the weak Spanish colony of Santo Domingo shortly after it had declared its independence of the mother country. Thus the whole island was brought under the nominal republic of Haiti, and over it Boyer ruled as a military dictator, with his capital at Port-au-Prince. At first, following Pétion's policy, Boyer left the inhabitants to their own devices; but after a few years he adopted a general policy of compulsory labor, with rural police to see that the people worked five days a week in the country at agriculture, road-building, and other occupations. Though all who were able to do so were required to work, they did so under contracts stating the length of service due to a given employer, and all were expected to be paid. The work of artisans in towns likewise was supervised, and vagabondage was punished.

In an effort to add to the population and to the labor supply, Boyer invited immigration of free Negroes from the United

States, and he proposed to pay their passage. He hoped that as many as twenty thousand would come; but the number who responded seems not to have been more than a few hundred, and many of these, not liking the military rule in Haiti, soon returned home.

The most serious problem of Boyer's rule was that of relations with France. Under his predecessors that country had repeatedly sent commissions to try to secure indemnity for property losses of the whites during the struggle for independence and also to induce the former colony to return voluntarily to the French flag. These efforts had proved futile; but fear of definitely hostile action haunted the dictator. To avert the danger of reconquest, he opened negotiations in 1823; but these failed because Louis XVIII wished to reserve the right to control Haitian foreign affairs. In 1825, shortly after his accession to the French throne, Charles X sent to Haiti a menacing fleet, the commander of which presented terms of settlement in the form of an ordinance insultingly worded instead of a project of a treaty. By the document France agreed to recognize Haiti as independent upon the payment of a hundred and fifty million francs in five annual installments and the granting of special commercial favors to Frenchmen. Thinking that independence was at stake, Boyer agreed to the terms; and to meet the first payment he borrowed in France thirty million francs at exorbitant rates. This ended the payments for a time, but Haiti was left alone until after the accession of Louis Philippe to the French throne. Becoming convinced that the country was quite unable to meet the terms wrung from Boyer by Charles X, in 1838 the new king signed with Boyer two treaties, one of which recognized Haitian independence, and the other reduced the total amount owed to France to sixty million francs, payable in thirty years.

However, the recognition of financial obligation to France through the acceptance of Charles X's terms caused many Haitians to feel resentful toward Boyer. The increasing harshness of Boyer's policy, too, had produced disaffection before the settlement with Louis Philippe. Then came serious friction between the president and his parliament, which had at first been safely docile. Conspiracies against him followed, and early in 1843 he was forced into exile.

Now began a rapid decline. For four years the country was distressed by revolutions and civil wars, and the presidents averaged less than a twelvemonth in office. Santo Domingo, taking advantage of the confusion, revolted and set up an independent government in 1844. In 1847 Faustin Soulouque, an ex-slave who could scarcely sign his name, got control, and presently had himself proclaimed Emperor Faustin I. After creating an extensive new imperial nobility, Soulouque and his wife Adelina were crowned with elaborate ceremonies, following as far as possible the model set by Napoleon Bonaparte and Josephine. It was a fine show for the Haitians, but an expensive one. The treasury became empty and remained so; for Salomon, minister of finance and recently created Duc de St. Louis du Sud, had quaint ideas of political economy, and strangled commerce by creating monopolies and boosting tariff rates. General stealing of funds by public officials did not help the situation; nor did the fact that the dominating ambition of Faustin I was the reconquest of Santo Domingo, against which he conducted various futile campaigns. To make disaster more certain, the emperor was cold-blooded and tyrannical. His enemies increased and were discovered in plots against him; many of them were executed at his orders, and by the close of 1858 the prisons were filled with the rest. In the following January he was overthrown by revolution, and soon afterwards went into exile.

After Faustin Soulouque's downfall the nominal republic was restored and was headed by a fairly able man, Nicolas Geffrard, who secured recognition of the nation by the United States. But on the whole the country continued on the downward grade during the next sixty years: revolutions and civil wars became more frequent and rulers became more selfish and sordid.

Social conditions, very bad at the beginning of independence, appear to have declined also, rather than improved, for there was little incentive to improvement. Most of the demoralized Roman clergy of the colonial era fled the country during the wars for freedom. From 1805 to 1860 the men of that faith who worked in Haiti were in most cases men in disrepute elsewhere, for during that period there was no organic connection between the papacy and Haiti. The clergy in the country were nominally supervised by the minister of religion and public instruction and were largely paid by the fees they collected. In 1860, however, a concordat was signed with the Pope, and Haiti again came fully under the Roman hierarchy. A separate archbishop was appointed, two seminaries for the training of priests were established, and a number of able clergy who arrived from Europe temporarily improved the influence of the Roman Church.

Chiefly in the early decades of independence some Protestant missionaries came in. Pétion welcomed the first comers; Boyer persecuted them for a time and then gave them full permission to carry on their missionary work. However, serious persecution of Protestants soon came, under Soulouque, and this, with the increase in revolutions and general disorders, caused the work of the missionaries to decline toward the close of the nineteenth century.

Most of the Haitian authorities did nothing to speak of for general public education, partly because of their own ignorance and partly from lack of money, the result of official graft and national indolence. Pétion and Geffrard were, however, among the early exceptions. The former founded a lycée, or secondary school, for boys and a boarding school for girls, and subsidized private institutions from the national treasury. The latter added to the number of primary and secondary schools, reorganized the existing school of medicine, established a school of law, granted government pensions to youths who desired to study in Europe, especially along technical and industrial lines, and gave some aid to private schools. These last were mostly under religious organizations. The Protestant missionaries promptly opened primary schools, and during the height of their work had a number of schools scattered over the country. About the time when their work suffered serious decline under Soulouque's persecution, Catholic orders began to come in and start educational work, among the first being the Sisters of St. Joseph de Clugny and the Christian Brothers. But the educational institutions were never adequate to the needs of the population; and in 1915, when a new régime began for Haiti, the public schools were notoriously inefficient. At this time at least 90 per cent of the country's more than two million inhabitants were quite illiterate. Among those who were able to read and write, a small fraction, most of whom had studied in Paris, were well educated.

The cultured element, who spoke good French, were largely residents of the cities, where there was some interest in literary pursuits[1] and in intellectual matters in general. The mass of the population were country dwellers. These spoke a patois called "creole," made up of French, Spanish, African, and Carib words. Though practically all existing material improvements were found in the towns, all of them were very backward. The rural sections which had reverted to jungle about a century before showed little or no improvement over that time. They remained largely jungle, pierced here and there by trails and broken by primitively cultivated patches of land dotted with the huts of the peasants. Nearly all the farm work was done by the women, for the men were too demoralized by their frequent warring activities to occupy themselves with such humdrum duties in times of peace, and they were too fearful of military conscription to show themselves in the towns and engage in the more exciting task of selling agricultural products, so that the women did this also. Coffee, cotton, cacao, and sugar were the staple crops, but the annual average output of farm products in the late nineteenth century was less than a third of that of 1790. Furthermore, tillage products had degenerated in quality, as had also the breeds of domestic animals.

Dislike and suspicion, mingled with something akin to contempt in the case of the most ignorant, still marked the general attitude toward whites, of whom there were but a few hundred in the country. However, the inhabitants, especially those in the rural sections, were kindly and hospitable to strangers if they were politely treated by them. These country folk were peaceable when not stirred up by the wars of politicians; but they were exceedingly superstitious, and voodooism, occasionally accompanied by human sacrifice and cannibalism, was rather general among them. Most of the inhabitants were afflicted with tropical or other diseases, and this partly explained the prevalent tendency to idleness and lack of ambition; but the belief among those interested in social position that manual labor was degrading contributed much to this tendency. Morals were irregular, and married parents were the exception rather than the rule. Hence wholesome family life was rare, and the mother had most of the moral as well as material responsibility for rearing the children.

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[1] The Haitians have produced some creditable writing, the best probably being in the field of verse. The poets have largely been inspired by French models, but their contributions are national in the tropical intensity of their emotions and in their rich local color and setting. The most original verse has been written in "creole," the patois spoken by the uneducated, and the ablest of the poets who used this medium was Oswald Durand (1840–1906). The best of his creole verses is a love poem, "Choucoune." Most of Durand's writings appeared in two volumes published in 1896 under the title *Rires et Pleurs*.

Such was the general condition of the Haitian people in the second decade of the twentieth century when the economic and political situation of the country began to attract the serious attention of the United States government. Difficulties involving Haitian financial relations came to the front in 1914. In 1910 the National Railroad of Haiti, an American company, had gained a concession to build, with aid from the government of Haiti, a railroad connecting Port-au-Prince and Cap Haitien; but it made very slow progress. By 1913 only three unconnected parts of the line were completed, at an alleged cost of about three and a half million dollars. The Haitian government refused to make further payments toward the undertaking, on the ground that the length of road called for by the contract had not been completed. The company had been guilty of corruption and mismanagement, but it blamed Haitian revolutions for its delay in building and tried to get support from the United States government.

Because of the bad state of Haitian finances, aggravated by increased political demoralization, difficulties developed at this time in another but related quarter. The National Bank of

Haiti had since 1910 been virtually a branch of the National City Bank of New York, which was connected with the disaffected railroad company. The New York bank had made a loan to the Haitian government through the bank of Haiti; which had, by the loan contract, become the treasury of the country and received all government funds. Anxious to gain better security for its investment, the National City Bank decided to bring pressure to bear upon the Haitian government to induce it to request that the United States should help it to straighten out its financial difficulties and should undertake the collection of customs. The authorities at Washington were also anxious for control of Haitian tariff revenue, since debts owed to foreigners had recently caused certain governments to take unpleasant interest in Haitian affairs. In June, 1914, both France and Germany, with the aim of securing payments, demanded control of Haitian finances. The next month the National Bank of Haiti let it be known that it would not pay over to the government the funds for the fiscal year beginning October 1 until the end of that year. This was a new move for the bank, but no breach of contract. The Haitian government, anticipating financial shortage, issued paper money to meet expenses, and tried to draw out of the bank two million dollars pledged to the redemption of existing paper currency. The bank refused to surrender these funds. The Haitian government tried to force payment, and on the appeal of the bank the United States government sent to Port-au-Prince a cruiser which brought half a million dollars of the bank deposits to New York, where they were placed in the National City Bank.[1] After this the United States government made a futile attempt to induce the authorities at Port-au-Prince to give it control of Haitian finances.[2]

At this time political conditions in Haiti were at a lower level than ever before. In seven years' time eight men had occupied the presidency. The last of these, Vilbrun Guillaume Sam, gained control in March, 1915, but his position was seriously threatened from the beginning, and within a few months he had filled the jail in the capital with his opponents. On July 27 the presidential palace was attacked by his enemies; he fled for refuge to the French legation, which was next door. A few hours later, under orders from one of his followers, about one hundred and sixty-seven of the political prisoners, including many leading Haitians, were shot to death in the jail. This massacre caused relatives of the murdered men to invade the French legation, drag out Sam, and throw him to the mob, who hacked him to pieces and paraded through the streets with fragments of his body.

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[1] Four years later the money was returned to Haiti with interest at 2 per cent.

[2] For the principle behind this idea see page 786.

On July 28, 1915, marines were landed from a United States cruiser, and American military occupation of Haiti began. Order was restored; and on August 12 the president of the senate, Philip Dartiguenave, who the United States authorities had indicated would be acceptable to them, was elected president by the Haitian congress. A treaty with Haiti, drafted in Washington, was ratified in November by the Haitian congress through pressure from Admiral Caperton, who was in charge of the United States naval forces. It went into effect in May, 1916.

The arrangement aimed to secure governmental stability and economic development for Haiti by means of a political and financial protectorate by the United States for a period of ten years. Later the treaty was extended for another ten years, to expire in 1936. It provided for an American financial adviser and receiver-general of customs, for organization of a Haitian constabulary by American officers, for development of public works and measures to secure better sanitation and health, and also for agricultural and technical training, all under supervision of experts from the United States.

In 1917 a Haitian national assembly refused to ratify the draft of a new constitution prepared in Washington, and was dissolved by President Dartiguenave under pressure from a commander of American marines. The next year the constitution was adopted by a farcical plebiscite held under American military supervision. The chief change to which the members of the assembly had objected was a grant to foreigners of the right to hold land, until then jealously withheld from white aliens. A few Haitians, however, and in general the Americans connected with the forces of occupation, felt that this concession was necessary to attract the foreign capital essential to the economic development of the country. To guard against the evils of absentee landlordism and foreign control of Haitian lands, the constitutional provision stipulated that only residents of Haiti could acquire real property and that title to it should be forfeited to the government by five years of uninterrupted absence from the country.

The constitution provided for a bicameral congress to be elected by popular vote and for a president to be chosen for a four-year term by the congress sitting as a national assembly. The election of congress was to take place on January 10 of "an even-numbered year," the year to be named in a presidential decree. A council of state appointed by the president was to exercise the legislative power until a congress should have been constituted. To prevent the American intervention from being embarrassed by a hostile congress, no elections for that body have taken place since then; and the council of state, holding office by presidential appointment, has elected the president and enacted laws. In 1922 Louis Borno, a mulatto of superior education and culture who was in sympathy with American aims, was elected president. He was reëlected in 1926.

Early in 1928 thirteen amendments to the constitution which were adopted by the council of state were ratified by plebiscite. These included a provision for the extension of the presidential term to six years, with ineligibility for immediate reëlection, and another making changes in the judiciary possible in order to secure greater coöperation with the work of American officers of the intervention.

During the first seven years of the attempt to execute the provisions of the treaty of 1916 many difficulties developed, the most serious being an uprising of *cacos*, ignorant country dwellers who contributed to the bandit class and were professional supporters of revolutions. They as well as most Haitians resented the presence of the Americans; but the uprising was chiefly the result of abuse, by native *gendarmes*, of a corvée law of 1864 which was revived in the interest of road-building under the American occupation. Orders by American officials that no man should be required to work on roads outside his district or more than the number of days called for by the law were disregarded in many cases; and even a command given in October, 1918, to stop the corvée entirely was disobeyed. Resentment against the Americans became very great, and in some quarters the ignorant blacks believed that their reënslavement was beginning. The uprising began in the summer of 1918 with the activities of a caco chieftain named Charlemagne, who easily got a following in the districts of the north, where the abuse of the corvée was very great. By the early part of the next year it was estimated that as many as five thousand Haitians were in arms in the northern and central parts of the country with the object of driving out the Americans. Not until nearly two years of guerrilla fighting had continued against them was the resistance of the cacos ended.

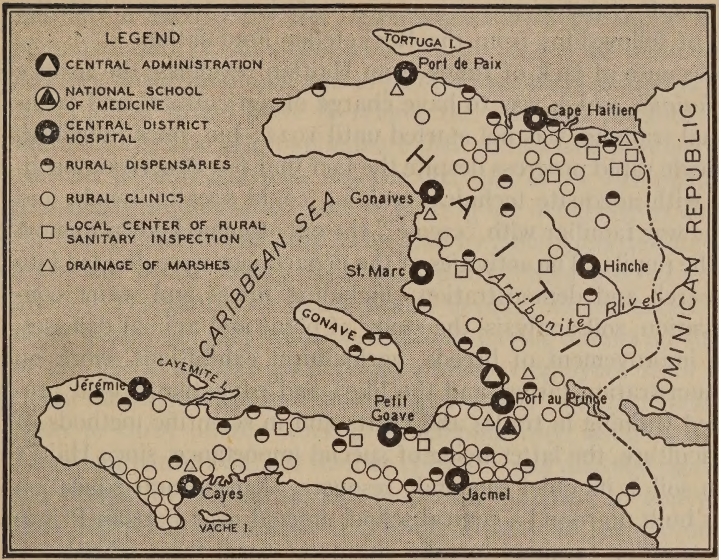
This uprising, as well as complaints against the coercive attitude of the American military officers toward the Haitian authorities, led to investigation of the situation by a committee of the United States Senate. This revealed various abuses and led to certain reforms. Many of the evils were believed to be caused by division of authority; therefore the work of the occupational forces was centralized in General John H. Russell, who was appointed high commissioner with the rank of ambassador. This change made most of the old abuses impossible and improved the efficiency of the various departments, each of which was headed by a "treaty official" responsible to the high commissioner. Until the posts of financial adviser and receiver-general of customs were merged there were six departments, the other four being gendarmerie, public works, public health, and technical service. At the head of each was an American expert of broad experience.

Under the American intervention financial chaos was gradually replaced by order and efficiency. The tax burden was redistributed, and the upper classes were required to bear a larger share of it; graft was eliminated from the collection of revenues, also much of the previous inefficiency; foreign claims against the Haitian government were placed in the hands of a commission and those found valid were paid; the currency was stabilized; the budget was balanced; current expenses were kept within the national income, despite the expenditure of considerable sums for public improvements of various kinds; and the public debt was reduced from about $36,000,000 in 1915 to $18,887,623 on September 30, 1928.

Under the American occupation a volunteer gendarmerie trained by United States officers supplanted the former conscripted army and communal police, but the total number of men under the new system was much less than under the old. By means of the rural police division of the gendarmerie, which was made up of five hundred and fifty-one men (one for each of that number of districts), banditry was kept down and life and property were made safe.

Under the intervention the department of public works at once began to play an important part in the modernization of Haiti. One of its first tasks was the improvement of means of transportation. By the close of 1928 about eight hundred miles of national highway had been completed besides many secondary roads and trails, and these were used by nearly three thousand freight and passenger automobiles, whereas in 1915, says a resident historian, there were only two or three automobiles in the country, "and no place for them to go." Harbors were improved and lighthouses increased from three to fifteen. Modern waterworks were built in the larger towns; street-paving was extended, also telegraph and telephone service; a large number of substantial public buildings, including many schoolhouses, were erected; some of the irrigation systems dating from the French period were repaired, and new ones were projected and begun. One of the most important of these will provide for the watering of about sixty thousand acres of alluvial soil in the Artibonite valley in the central section of the country.

The work of the department of public health quickly roused appreciation from the Haitians. At an early date sanitary regu-


LEGEND
CENTRAL ADMINISTRATION
NATIONAL SCHOOL OF MEDICINE
CENTRAL DISTRICT HOSPITAL
RURAL DISPENSARIES
RURAL CLINICS
LOCAL CENTER OF RURAL SANITARY INSPECTION
DRAINAGE OF MARSHES
TORTUGA I.
Port de Paix
Cape Haitien
DOMINICAN REPUBLIC
HAITI
Gonaives
CARIBBEAN SEA
St. Marc
Hinche
Artibonite River
GONAVE
CAYEMITE
Jérémie
Petit Goave
Port au Prince
Cayes
Jacmel
VACHE I.

HAITI, SHOWING ACHIEVEMENTS OF THE PUBLIC HEALTH SERVICE OF THE AMERICAN OCCUPATION

Based on map in report of Director General, December, 1927

lations were drawn up and published. Modern improvements were introduced into the few existing hospitals and new ones were founded. The country was divided into sanitary districts provided with rural clinics and dispensaries. A compulsory vaccination law was put into effect, and war was begun against the disease-breeding mosquito. Health inspection was provided for in the schools; and in the malaria-infested districts doses of quinine administered to the pupils were found to have a better effect on class work than moral suasion or corporal punishment. Poorhouses and orphans' homes, an asylum for the insane, and a special hospital for lepers were built. A school for training nurses was started, which supplemented the work done by French Sisters of Charity. To supply much-needed native physicians the old medical school in Port-au-Prince was housed in a new building and was reorganized and modernized by means of a staff of native physicians given graduate training with the aid of fellowships from the Rockefeller Foundation.

Because of lack of funds from Haitian revenues, the *service technique*, which was to have charge of agricultural and vocational training, was not started until 1922; but, once launched, it made rapid progress despite the fact that few American teachers with adequate technical training could speak French, and none was familiar with "creole," the only tongue known to most of the pupils. The activities of the department were divided into research and demonstration (including forest and water conservation, soil analysis, the study of plant and animal diseases, the improvement of breeds, agricultural exhibitions, work on demonstration farms, and the like) and education, which provided training in trades and crafts and in scientific methods of agriculture, the latter being of special importance, since Haiti's rich soil is its chief economic resource. Agricultural education was built up round a central school erected near Port-au-Prince for training teachers to take charge of rural farm schools established by the department in various parts of the country. Since it was soon found impossible to teach even the elements of agriculture to illiterates, the technical service started classes in primary instruction in the rural farm schools, thus supplying a badly needed supplement to the inadequate and inefficient public-school system of the old régime. Before the close of 1928 there were forty-eight such farm schools in operation.

After the centralization of the intervention activities in 1922 no serious abuses appeared, and the achievements of the departments of public works and public health were generally approved by the Haitians. But the attacks on the American intervention continued. The noisiest part of it (which was really propaganda) came from the professional politicians, who keenly resented the fact that the old opportunities to help themselves from the public funds had been taken away by the United States authorities; but there were criticisms from American residents and from thoughtful, public-spirited Haitians also. One of the most general causes for resentment from these was the continuance of military emphasis by retaining a large force of marines in the country and continuing an army general as high commissioner. It was pointed out that to reduce the number of marines to the minimum and to place a civilian in charge of the intervention would serve to relieve the wounded pride of the Haitians and also help to eliminate their militaristic psychology. Another general grievance was the fact that as the years passed practically all the skilled work in most of the departments under the treaty officers continued to be done by Americans despite the statement of the treaty that the United States was to *assist* Haiti to reorganize its finances and develop its resources. In other words, not only were the Haitians having almost no share of the liberal salaries paid to department employees from national funds, but they were not being given the training to enable them to carry on the work of developing their country after American withdrawal. A further criticism was directed against the refusal of the authorities to permit congress to convene, thus depriving the people of the opportunity to learn orderly self-government.

Revolts, which were quickly suppressed, broke out late in 1929. On February 28, 1930, a commission which was appointed by President Hoover to study conditions reached Haiti. At the time resentment was strong over Borno's apparent intention to succeed himself in the coming May, when his term expired. The commission induced him to withdraw in favor of Eugene Roy, a man of high character acceptable to all parties. It was agreed that Roy, as provisional president, was to call an election of the legislature, which, sitting as a general assembly, should choose a president for a full term. This plan was approved by President Hoover, as was also the committee's recommendation of more rapid Haitianization of the American intervention service, the gradual withdrawal of the marines, and the displacement of General Russell as high commissioner by a civilian. On April 21, 1930, the Haitian council of state, in accordance with the agreement, named Eugene Roy as temporary executive of the country.

XVII

THE DOMINICAN REPUBLIC

> Desgarra, Patria mía, el manto que vilmente
> sobre tus hombros puso la bárbara crueldad;
> levanta ya del polvo la ensangrentada frente,
> y entona el himno santo de unión y libertad.
>
> Salomé Ureña de Henríquez, "A la Patria," in *Poesías*

THE Spanish Dominicans, as has already been stated, were quite at the mercy of their Franco-African neighbors when European ties with the ancient colony of Hispaniola had been cut. According to the census of 1824, they numbered in that year but fifty-four thousand, whereas the inhabitants of French Haiti totaled more than six hundred and sixty thousand, an advantage of twelve to one on the side of the more militaristic population.

The weakness and helplessness of the Spanish-speaking inhabitants not only made Boyer's conquest of them in 1822 an easy matter, but caused them to be ruled with all the harshness of a conquered province. It was the aim of the dictator of the island to Ethiopianize and Haitianize the population of the eastern part. Inasmuch as the whites of the latter, numbering perhaps a fourth of the whole, were not permitted to own land under the Haitian constitution, and were otherwise discriminated against, many of the wealthier ones left the country. The use of the Spanish language among the remainder was discouraged; the University of Santo Domingo, which had been an important intellectual center during colonial days, was closed to prevent it from being a hotbed of conspiracy, and the students were sent into the army. Various Dominican monasteries and churches were despoiled of their property, and the population as a whole was taxed in an effort to raise the indemnity for buying Haitian independence from France. Besides the matter of landownership, the inhabitants of African blood were favored in various ways: slavery was abolished, and the proportion of Negro blood in the population was increased through the establishment of colonies from the western part of the island and of free blacks from the United States.

Although under Boyer's rural code compulsory farm labor was introduced, yet agriculture and stock-raising declined, partly because of commercial handicaps placed by the dictator on the conquered territory. The people were broken in spirit, and intellectual stagnation accompanied economic decline.

For a while the few Dominican leaders hoped that Spain would rescue them from their oppressive captivity; but when no help came from that quarter they realized that they must depend upon themselves and their people for the recovery of their liberty. The decided increase in Boyer's unpopularity in the late eighteen-thirties encouraged them to ally themselves to some extent with his Haitian enemies and thus to contribute toward his overthrow. Propaganda for liberty was also spread, rather openly by means of the theater and secretly through the clergy by aid of the confessional and through organizations specifically bent upon spreading the idea of independence. The most important of these was La Trinitaria (so called for its motto, "Dios, patria, y libertad"), founded in 1838 by Juan Pablo Duarte. Its activities were discovered, however, in 1843, and the Haitian dictator who succeeded Boyer exiled the leaders instead of helping them to freedom, as had once been hoped. Nevertheless, on February 27, 1844, independence was proclaimed under the lead of Ramón Mella, and the flag of the Dominican Republic was hoisted.

The Haitian authorities capitulated, but they repeatedly made attempts to reconquer the territory. Invasion across the unmarked boundary between the countries took place again and again, to the distraction and terror of the Dominicans. Danger of reconquest was increased by internal strife, which in turn was partly caused in the beginning by the danger of reconquest. In other words, there was friction over what should be the country's future status. Pedro Santana and a good many others felt that it would be futile for the little nation to attempt to preserve complete independence, and favored a protectorate by some strong power. Juan Pablo Duarte, Ramón Mella, and various others who had sacrificed more for independence than Santana opposed this policy as cowardly and dangerous to Dominican welfare. Armed conflict between the two factions gave the victory to Santana, who sent Duarte and the other pioneer patriots into exile.

For most of the next thirty years Santana and Buenaventura Báez controlled the affairs of the country, directly or through underlings. Both were of mixed white and Negro blood, and both were selfish and unscrupulous; but Báez was fairly well educated, whereas Santana was rough and ignorant. For a time the two men worked in friendly coöperation, but in 1853 they became bitter enemies. Usually there was no lack of excitement for either. Santana, the first of the two to head the government, was well occupied with uprisings against him at home, largely caused by the element which favored absolute independence, with combating Haitian invasions, and with seeking a protector for the country. At first he looked to France for help; but Louis Philippe soon declared that he "was firmly decided not to mix in the affairs of the Dominican Republic," adding, however, that he had no objection to a protectorate by Spain. Spain likewise decided upon a policy of "hands off," chiefly because of warnings issued by England and the United States about twenty years before.

After the accession of the insistently aggressive Faustin Soulouque in the neighboring state, the danger of reconquest became greater; for the ambitious monarch refused to recognize Dominican independence and repeatedly laid waste by fire and sword large sections of the western part of the country. Most of the leaders of the republic were brought to favor the unpopular expedient of a protectorate. Hence late in 1849 Báez, then in power, continued negotiations with France with protection in view, and also approached England and the United States, explaining to the latter that he preferred annexation to a mere protectorate; but from none of these countries did he receive a favorable reply. During the next two years, however, these three governments repeatedly warned Faustin against attacking the Dominican Republic and tried to induce him to recognize the state's independence or at least to agree to a truce for ten years. But Faustin refused to do either. However, though he had sworn by the soul of his mother not to leave a chicken alive on Dominican soil, the close attention of the three powers somewhat abated his pugnacity until 1855, when the Crimean War absorbed the attention of France and England. He then resumed his aggressive attitude toward the Dominicans, who were kept constantly on the alert to defend their country.

Moreover, because of the aggressiveness of the proslavery element in the United States the Dominicans were almost as fearful of that country during most of the eighteen-fifties as of Haiti.

This situation caused Santana, who had been at war with Báez during much of the time for some years and who got control again in 1859, to try once more to obtain foreign protection. His favorite plan had long been to secure Spain as a guardian. Hence he secretly began negotiations with that country, and after much discussion reached an agreement. On March 18, 1861, just as the United States was plunging into its civil war, Queen Isabella II of Spain was proclaimed in the ancient colony of Hispaniola and the colors of the Dominican Republic were replaced by those of the Spanish monarchy.

Now began harder times for the Dominicans than they had experienced since they escaped from Haitian domination. In reward for his zeal Santana was made civil governor and captain general of the colony (as he had expected to be when he began negotiations with Spain), and now, feeling himself free from the danger of being ousted by Báez, he ruled with great harshness and arrogance. Most of the other important offices were filled by Spaniards, who looked down upon the Dominicans because of their strain of Negro blood. Taxes became heavier; the Protestant churches, which had begun to be founded in the days of Boyer, were closed; and inquisitorial methods were introduced by the Spanish clergy.

Resentment and opposition toward Santana and Spanish rule, which had existed from the first, grew rapidly. Finding his position untenable, the governor resigned early in 1862 and was given a title of nobility and a pension by the queen. By this time, however, plottings for independence had begun, especially across the border in Haiti, where, Geffrard being now in power, opponents of Spanish control found refuge. In August, 1863, the "War of the Restoration" definitely began, and a provisional revolutionary government was soon set up at Santiago de Caballeros. The attempt to put down the revolt proved very expensive and therefore became increasingly unpopular in Spain, beset at the time by abnormally corrupt and inefficient rule under Isabella, whose throne was none too steady. Early in 1865 the anti-annexationist party came into control in Spain, and on May 1 of that year the queen signed a measure abrogating the act of annexation.

The Dominican people were again free; but the wrecking of their land had been made somewhat more complete by the year and a half of bitter warfare against Spain, and the militaristic spirit in politics had become more selfish than ever and the revolutionary spirit more rampant. Santana, who had been forced to take up arms in favor of Spain, had died during the War of the Restoration; but Buenaventura Báez was still alive and still politically ambitious, and he managed to be in control much of the time until 1878. Santana's mantle fell upon José María Cabral, who, as a leader of the opposition to Báez, came into a short period of control late in 1866.

The finances of the country, which had been chronically bad, were by this time desperate, and Cabral looked about for foreign aid. The wiping out of slavery in the United States had restored Dominican confidence in that country, and now it was approached with the request for a loan. Secretary of State Seward countered with a proposal for the lease or purchase of land for a naval base on Samaná Bay in the northeastern part of the Dominican Republic; the United States government had for some time been interested in acquiring such a base. Nothing came of the negotiations, for the sale of the territory was refused as a violation of the Dominican constitution, and the terms for leasing could not be agreed upon.

The negotiations, however, made excellent political capital for Báez, who was striving to get back into power. He denounced with fiery zeal the attempt to dispose of Dominican territory and headed a revolution that overthrew Cabral. In May, 1868, he became president of the republic for the fourth time. As the financial problem still pressed for solution, he set about securing a loan from Hartmont and Company, London bankers. This firm agreed to issue bonds of the republic to the amount of £750,700, at exorbitant rates. Only £38,000 in bonds had been issued when the Dominican government canceled the contract on the ground that Hartmont and Company had failed to comply with the terms. The banking house continued to issue and sell the bonds, however, and kept the proceeds for itself, thus helping to bring the Dominican government into greater financial embarrassment than it had ever before experienced. Báez used the small sum gained from the blundering arrangement with Hartmont and Company to try to end the revolutionary activities staged in the western part of the country by Cabral and his colleagues with the help of Haiti, which, since the fall of Faustin I, had substituted practical meddling in Dominican politics for attempts at conquest. But the efforts of Báez failed, and his hold on the country remained weak and uncertain.

Then he decided not only to do that for which he had denounced Cabral,—lease Samaná Bay to the United States,—but even to try to secure annexation of his country to the American Union. The two transactions were provided for by treaties signed in November, 1869. The lease was for fifty years at an annual rental of a hundred and fifty thousand dollars. It was hoped that this measure would succeed even if the project for annexation failed. Báez agreed to secure a favorable plebiscite on annexation, and did so in February, 1870, after which the matter was taken up by the United States Senate. As is well known, President Grant was fascinated with the idea of annexing the Dominican Republic, but he made the mistake of ignoring the Department of State and carrying on his negotiations with the Báez government through a friend in the army. Partly because of this his cabinet was opposed to the measure; and it failed in the Senate, largely owing to the bitter attack led by Charles Sumner, chairman of the Committee on Foreign Relations. Later Grant, with the authority of Congress, sent to the Dominican Republic an able commission of investigation, which reported favorably to annexation, but the Senate failed to take up the matter again.

The plan for leasing Samaná Bay to the United States likewise came to nothing, and Báez therefore tried to secure funds by renting the Samaná peninsula to an American company on a ninety-nine-year contract at a hundred and fifty thousand dollars a year; but in 1873, before the company, which was a little in arrears, had made its first payment, Báez was overthrown, and his successor, Ignacio María González, canceled the contract on the basis of failure to make the payment.

During González's control, two constructive measures were enacted: treaties of peace, friendship, and commerce with Haiti and with Spain. The first, made in 1874, ended the hazardous relations which had existed for thirty years with the Dominican Republic's nearest neighbor and removed all need for seeking protection under a foreign flag. By the treaty with Spain those Dominicans who had left the country in 1865 as soldiers in the Spanish army were permitted to return, and many of them did so. For a short time it seemed as if the Dominican Republic were beginning to make real progress; for González and his successor were men of some public spirit, and Báez was permanently eliminated from political dominance in 1878 by being overthrown when he was filling the presidential office for the fifth time.

But in 1882 the worst man who has headed the country came into control. This was Ulises Heureaux, a savage and unscrupulous Negro of considerable education and much shrewdness, who for the next eighteen years was the power in or behind the president's chair. He had the constitution changed to suit his needs, and kept himself in power by buying off, exiling, imprisoning, or murdering his enemies. The money for his various extravagances, as well as for the upkeep of his large army and for routine government expenses, was obtained by issuing paper currency, by debasing the coinage, by securing forced loans from local merchants, and by borrowing abroad. The first foreign loans were obtained from Westendorp and Company, a banking firm of Amsterdam, and totaled more than a million and a half pounds; but in 1892 the San Domingo Improvement Company, an American financial syndicate, assumed the obligations to Westendorp and Company and made loans to Heureaux, guaranteed by the Dominican customs, amounting to more than twelve and a half million dollars. Three different times, in the effort to get more money, Heureaux discussed with the United States the lease of Samaná Bay but without results.

By means of later loans from the Improvement Company and accumulated interest, the total funded debt of the country had by 1898 become ten times as great as it was when Heureaux secured his first foreign loan; yet he had spent very little of the money toward the actual progress of the country, and the financial situation was about as bad as possible, with neither money nor credit in sight. In his desperation Heureaux turned to the United States government and asked early in 1899 that it establish a protectorate over the unlucky little republic, but that government bluntly refused the request. Actually, much of the money spent by the dictator went toward keeping him in his position through buying support; and with his large army he repeatedly put down uprisings of those who were unbought. Finally his opponents decided in the spring of 1899 to abandon revolutionary plans and to concentrate upon killing Heureaux. In this they were successful. He was waylaid and shot on the twenty-sixth of the following July.

During the next five years the country was torn by revolutions and factional strife, and the financial situation grew increasingly worse. Late in 1899 a sum amounting to nearly three hundred thousand francs was raised by popular subscription to pay old claims due to France and to avert a threatened blockade of Dominican ports by French vessels. Soon afterwards a violent quarrel developed between the San Domingo Improvement Company, which was disliked and distrusted by the Dominicans as a former agent of Heureaux, and the new government of the country. After long-drawn-out negotiations between the Dominican and American governments over the matter, the claims of the company were scaled down by more than one half, and in July, 1904, it was agreed that four Dominican customhouses should be designated as security for the debt. If the Dominican government failed to meet the monthly payments called for by the settlement, a financial agent appointed by the United States was authorized to take charge of the customhouse at Puerta Plata; should the income from that prove insufficient to meet the payments due, he might take charge of others.

At this time the total debt of the Dominican Republic was thirty-two million dollars, about two thirds of which was owed in Europe. The interest in arrears on the foreign obligations, together with that almost due, amounted to more than two and a half million dollars, and the sum estimated by the government to be available for payment was less than one fifth of the amount needed. No payments having been made on the American debt by October 20, 1904, the Puerta Plata customhouse was taken over by an agent appointed by the United States government. This move on the part of the United States to get satisfaction for its nationals led to more insistent demands from various other foreign governments for payment of debts, and in December, 1904, the French representative in the country threatened to seize the customhouse at Santo Domingo. A refusal to comply with the demands of the most interested foreign governments would mean intervention on their part, with perhaps long occupation of the country. President Roosevelt, well aware of this, suggested that the Dominican government ask the United States to take charge of the collection of all customs in the country. As this seemed the best way out of the tangle of trouble, the Dominican authorities made the request, and a protocol was signed between the two governments on February 4, 1905. By this the United States government guaranteed the territorial integrity of the Dominican Republic and agreed to collect its customs, administer its finances, and settle its debts. The United States Senate, however, failed to ratify the agreement; whereupon Roosevelt took matters into his own hands and appointed an American customs-receiver for the bankrupt little state. Two years later a treaty based on the protocol, but omitting the territorial guaranty, was ratified by the United States Senate.

With United States control there came an abrupt change for the better in Dominican financial matters. The customhouses were no longer pawns for revolutionaries or objects of loot for the officials in charge of them. Under the terms of the protocol and of the treaty 55 per cent of the customs receipts were to be paid to creditors and 45 per cent to the Dominican government. How great had been the dishonesty in connection with the collection of customs may be realized from the fact that the 45 per cent collected under American authority amounted to more than the total customs revenue for any given year under the old régime. Moreover, by eliminating false claims and inducing creditors to make adjustments, the financial official appointed by the United States government reduced the national debt to seventeen million dollars. In 1908, after the treaty had been ratified by the United States Senate, the Dominican debt was refunded and money for internal improvements was secured by a bond issue for twenty million dollars guaranteed by the customs revenue.

Political progress too seemed to have begun in the Dominican Republic. In 1908 a new constitution was drawn up; it extended the presidential term to six years and abolished the office of vice president, which had made for friction. Ramón Cáceres, who had filled the office before, was elected chief executive, and during the first three years of his administration the country enjoyed unparalleled prosperity. It was hoped that revolutions were to become a thing of the past. Conspiracies were already afoot, however, and in November, 1911, Cáceres was killed by his political opponents. Then followed repeated revolutions and a prolonged factional war that devastated the country. Time after time the United States government tried, by good offices and supervision of elections, to establish peace, but in vain.

After a brief lull, revolution and civil strife were again so imminent in April, 1916, as to lead the United States to land troops near Santo Domingo. Consent for such action was secured from Juan Isidro Jiménez, who was president at the time. He was ill and in great danger of overthrow, and on May 6 he resigned his office. The capital, which had been seized by a rival of the president, was shortly afterwards occupied by American forces; and before the close of the year about eighteen hundred United States marines had overrun the country.

In July the Dominican congress elected as temporary president Francisco Henríquez y Carvajal, a noted physician and a man of unusual culture who had served the government in other capacities. He was chosen with the understanding that his term was to be for six months only and that he was not to seek to be returned when the general election took place. The United States government, tired of the Dominican turmoil and feeling that the treaty had been inadequate to place the country on the road to progress, was unwilling to recognize President Henríquez until his government should have ratified a new arrangement based on the treaty recently forced upon Haiti. This document provided, as did that of 1907, for American control of the collection of customs, but it also called for a financial adviser from the United States and for the organization and training of a Dominican constabulary by American officers. Feeling that the treaty would deprive his country of its liberty, Henríquez refused to accept it, whereupon the American authorities refused to pay to the Dominican government, until the treaty should be ratified, the 45 per cent of customs revenue which was due it. Although this made the Henríquez administration financially helpless, it repeatedly rejected the treaty. Various officials continued to serve without salary; others dropped out to such an extent as to result in partial paralysis of the government. Toward the end of his six months' term Henríquez began to prepare for the general election, aiming (evidently with patriotic motives) to be returned to his position.

Consequently Captain Knapp, commander of United States forces in Dominican waters, proceeded to establish military government in the little country on the ground that the treaty of 1907 had been violated. The population was disarmed, back salaries were paid to Dominican officials, and orderly progress began again in the country. On the other hand, under the American occupation the press was muzzled for a time and individual Dominicans were treated with arrogance and harshness by officials from the United States, in some cases being murdered by them. This caused not only increased resentment in the Dominican Republic but also much criticism from the people of the United States, and led to an investigation by a Senate committee from Washington after the World War had ended.

These attacks doubtless accelerated the withdrawal of the American military forces, especially as they had been used as capital by the Republican party against the Wilson administration in the presidential campaign of 1920. In June of the next year, three months after the accession of President Harding, the American military governor of the Dominican Republic issued a proclamation setting forth the preliminaries of evacuation. The first stipulation was ratification, by a civil government which should be elected, of all the acts of the military authorities. A native constabulary had been created, but no adequate national guard existed; therefore it was required that such a force be trained by an American military mission to be requested by the Dominican civil government. A loan of two and a half million dollars for the completion of various internal improvements begun by the military government was also called for, and agreement to an extension of the power of the American receiver-general to cover the loan and to meet emergencies connected with the foreign debt.

The proclamation at once roused intense resentment throughout the Dominican nation, partly because it was connected in many minds with the Platt Amendment, which formed the terms of Cuba's independence, and was believed to show intention on the part of the United States government to restrict Dominican liberties. All leaders of the nation promptly indicated their intention to hold out against the terms of withdrawal. They were informed that failure to ratify the terms mentioned would delay evacuation. Discussion followed which brought out the fact that much of the continued opposition was caused by Dominican resentment toward the military officials of the occupation and by the failure of these to understand Dominican psychology.

It was therefore decided by the authorities at Washington to send a civilian commissioner to explain the plan of evacuation to the Dominicans and to discuss it with them in order to find a common basis of agreement. Sumner Welles, formerly chief of the Latin-American division of the Department of State, was chosen for the task; he arrived in the Dominican Republic in July, 1922. In coöperation with a commission of representative Dominicans, he worked out such a plan of withdrawal as would safeguard the work done by the military government, especially through the recognition of its decrees; but the demand for American training of a national guard was omitted. The plan was completed and published late in September, 1922. A constitution framed in harmony with the terms of evacuation was proclaimed in June, 1924; by it the vice presidency was restored, and various provisions were introduced with the aim of eliminating the political disorders which had been the bane of the country.

Before the close of 1922, promptly after the agreement on a plan of evacuation, a provisional government created by the Dominican commission had begun to function; it took over much of the administrative work from the military authorities. In March, 1924, a general election was held at which a large vote was cast and a good spirit was displayed by the Dominicans. The choice for the presidency was General Horacio Vásquez, who was inaugurated on July 12, 1924. The American marines had already begun to be withdrawn, and by the middle of September they had all left the country. Except for the United States control of the customs, given by the treaty of 1907, the Dominicans were entirely free. Near the end of his term Vásquez had the choice of his successor put off for two years, and then sought reëlection in May, 1930. This provoked a rebellion in February, 1930, which forced him from office.

In the troubled century since its first liberation from Spain numerous nonpolitical changes have taken place in the Dominican Republic. One of the most striking of these is the growth of the population from about fifty-four thousand in 1824 to almost nine hundred thousand in 1921, as given by the first official census, and an estimate of 1,022,485 in 1927. Most of the growth has been due to natural increase, for at no time since the Haitian wars for independence has immigration been great. During Haiti's struggle for freedom, as has been stated, many whites took refuge in the Spanish part of the island; but a considerable fraction of these departed during Boyer's oppressive rule. The arrival of Negroes from the United States has already been mentioned. These settled largely in the northern part of the country in the section of Puerta Plata and the Samaná peninsula, where one district is officially named for them Sección de los Americanos. After the failure of the Ten Years' War in Cuba some immigrants came from that island, and from time to time others came in small numbers from Porto Rico and Spain. During the Heureaux régime Italians and Americans from the United States began to arrive, and the number of the latter somewhat increased during the period of military occupation.

The predominant blood in the population is Spanish, though almost all have an African strain. There is no color line in social or other relations; but the Dominicans like to be thought of as a white nation, and in their immigration laws they favor the coming of Caucasians.

Most of the inhabitants live in the country; Santo Domingo, the largest city, had less than thirty-one thousand inhabitants in 1923. Until after the middle of the nineteenth century the chief rural economic activity was raising live stock of poor breeds, chiefly cattle. There was some planting, but on a small scale and with very primitive methods. The Negroes from the United States brought some improvements in agriculture to the north; but greater change resulted from the coming of the Cubans, who started the fencing of cattle ranges, improved the breeds of stock, and introduced into the country dairying and large cane plantations, with better equipment for the sugar mills. During the long period of comparative peace under Heureaux, especially, there was much expansion of cane-planting, for the dictator encouraged foreign capital. The production of tobacco, coffee, and cacao also increased.

One of the serious handicaps to the intensive cultivation of the soil was long the fact that a large number of the small-scale farmers worked on communal lands inherited from the colonial period; but early in the twentieth century the community tracts began by common consent to be divided among their joint owners, and this movement was aided by a law passed in 1911. Another difficulty was the confusion as to boundaries and titles of lands. This was especially true of the public domain, which, on account of being unlisted and unsurveyed, was squatted on and appropriated on a large scale by private individuals. During the American occupation a fair start was made in straightening out titles.

Agriculture was handicapped during the nineteenth century by lack of satisfactory transportation systems. Vehicular roads were bad, and much of the produce was carried to market by means of heavy oxcarts. When the American occupation began there were but two public railroads in the country, totaling a hundred and forty-four miles. The older and longer, the Samaná-Santiago line, was completed in 1886 by a Scotchman named Alexander Baird under concession from the Dominican government. The road was of considerable economic importance to the country, inasmuch as it helped to tap the rich agricultural section to the northeast known as the Cibao. The other line, the Central Dominican, was begun in 1890 and was intended to run from Puerta Plata to Santo Domingo. Track-laying was started at Puerta Plata by a Belgian company, but when only about eleven miles were laid the Belgians sold out to the San Domingo Improvement Company, which completed the road to Santiago de Caballeros. Because of trouble between the company and the government, the latter took over the line in 1908; but it has not been completed to the capital, partly owing to the development of motor transportation. Considerable was done in motor transportation during the American occupation, more than four hundred miles of vehicular roads being completed by the time the marines were withdrawn in 1924. By the spring of 1927 fair motor roads connected Santo Domingo with Port-au-Prince, and a regular automobile mail service was started between the two countries, taking the place of the former slow carriage of mails by coastal steamers.

Until the latter part of the nineteenth century there was very little exporting from the Dominican Republic. In 1888 cacao began to be sent out, and was long the leading export, but in 1914 sugar took first place. By this time coffee, cotton, tobacco, forest products, hides, honey, and beeswax were being regularly sent out in exchange for manufactured articles. Owing to the peace and improved transportation facilities coming with the American occupation, there was a great increase in commerce, and the country has for several years shown an advancing prosperity.

Until the past twenty years the manufactures of the country were few and crude, but under government stimulation both quantity and quality have been improved. The leading articles of manufacture, which are practically all consumed locally, are cotton goods, hats, shoes, lumber, furniture, cigars, cigarettes, and matches.

The alternating foreign oppression and revolutionary turmoil from which the country suffered for nearly a hundred years after the first emancipation from Spain was a great intellectual handicap as well as an economic one. When it became free from Haiti in 1844 there were very few schools, and these were of little more than primary rank. The university, as has been said, was closed by the Haitian government. Not much improvement was seen in the educational situation until 1880, when Eugenio María de Hostos, a Porto Rican with intellectual vision and a love for teaching, arrived in the island. Dominicans gratefully remember him as bringing an educational renaissance. He wrote and spoke in favor of more and better schools, and founded in the capital a normal school that included in its classes many boys who later became leaders of the nation. Under Hostos's influence a regular system of educational administration was established by the government, with the municipalities directly responsible for primary schools and the state for secondary ones. A few years after Hostos began work interest in better educational opportunities for girls was specifically roused by Salomé Ureña de Henríquez, a noted poetess, who founded a high-class institute for girls. Graduates of the secondary and normal schools were admitted to the professional institute founded in 1882; in 1914 this became the University of Santo Domingo and was housed in the building occupied by the colonial university. Under the American occupation great impetus was given to education. In 1920 there were almost a thousand public schools in the country, with an attendance of more than a hundred thousand pupils, and the budget of 1924 provided for the establishment of three hundred more schools.

XVIII

CUBA

In Cuba we have a republic, but there are no citizens.—TOMÁS ESTRADA PALMA

THE next to the youngest of the Latin-American states, Cuba, which became independent in 1902, had advantages at the outset not enjoyed by any of the others. Under the military government of the United States, headed by General Leonard Wood, it was given as complete a preparation for a successful start in national life as the time permitted. The department of justice was reorganized, with salaries paid to the judges instead of the old pernicious practice of making justice dependent upon fees, and police courts were established in every part of the country. Efficiency in public office was demanded by the military governor, and corruption (including a case of it among American officials in charge of the post office) was exposed and punished. The economic development of the country was fostered by the building of many miles of roads properly supplied with bridges and by modernizing and extending the postal, telegraph, and telephone systems.

The American military government paid much attention to sanitation. The prisons and hospitals and similar institutions were cleaned up; and the cities in general, which were pestholes when the war for independence ended, were subjected to thorough sanitary reform. Street-cleaning became a routine, garbage was properly disposed of, and in the larger places modern sewer systems were introduced. The elimination of tropical disease, particularly yellow fever, which infested Cuban ports, was the most serious problem—one that threatened to prove baffling when, contrary to the theory of those in charge of health work, the cleaning of the cities seemed to have no effect upon the spread of the fever. However, Walter Reed and other physicians working under him in Cuba got an invaluable clue from Dr. Charles John Finlay, a Cuban of English parentage, who told them that he had long believed that yellow fever was spread by the bite of mosquitoes. The American physicians worked upon this theory, proved it correct,[1] and proceeded to wage war against mosquitoes, with the result that yellow fever was speedily and permanently eliminated from the island.

A census made in 1899 showed the population of Cuba to be a little over 1,572,000, about two thirds being white, and the rest Negroes except for a small fraction of Chinese. Sixty-six per cent of the inhabitants were illiterate, and of the remainder perhaps the majority could do little more than read and write. The crying necessity for education for democracy led Governor Wood to work energetically toward improving school opportunities. The best educational institutions in Cuba when he began were private schools; for the public ones, which were quite inadequate in number, were very inefficient, and little loyalty to duty was to be found among the poorly trained and poorly paid teachers. A new school law was passed providing for proper support and administration of education and for government inspection of private schools. Under the American military control nearly a fourth of the Cuban income was spent for education. During the colonial period secondary education had been provided by *institutos*, one for each of the six provinces of the country. These were modernized by the American authorities. The University of Havana, which had only four hundred and six students but ninety-six "professors," was reorganized too, most of the faculty being dropped as inefficient and new members being appointed on the basis of competitive examinations.

To bring about rapid improvement in Cuban schools was a more difficult task than it was in the Philippines, where the United States government was introducing reforms at the time.

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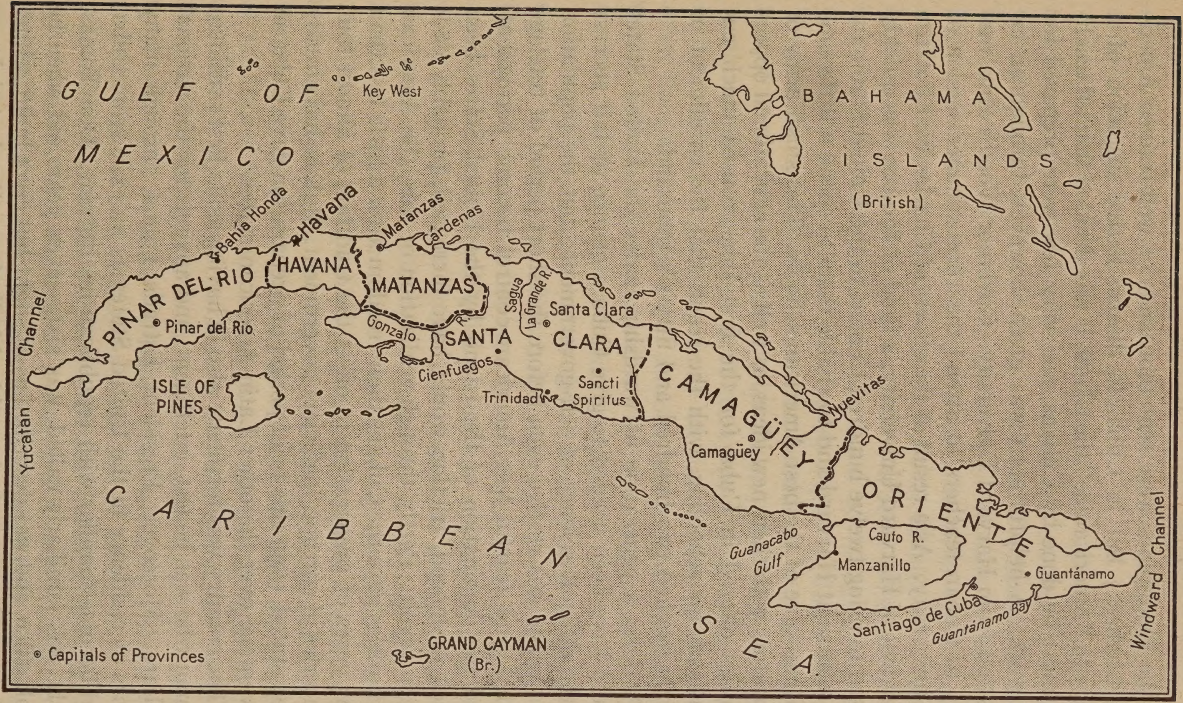
[1] In working upon the theory two physicians, James Carroll and Jesse W. Lazear, deliberately permitted themselves to be bitten by mosquitoes which had sucked the blood of yellow-fever patients. Both took the disease. Carroll recovered, but Lazear died.


GULF OF MEXICO
Key West
BAHAMA ISLANDS
(British)
Bahía Honda
Havana
Matanzas
Cárdenas
PINAR DEL RIO
HAVANA
MATANZAS
Pinar del Rio
Gonzalo
Sagua
La Grande R.
Santa Clara
SANTA CLARA
Cienfuegos
Trinidad
Sancti Spiritus
CAMAGÜEY
Camagüey
Nuevitas
ORIENTE
Cauto R.
Manzanillo
Guantánamo
Guanacabo Gulf
Santiago de Cuba
Guantánamo Bay
Windward Channel
Yucatan Channel
ISLE OF PINES
CARIBBEAN SEA
GRAND CAYMAN
(Br.)
Capitals of Provinces

THE REPUBLIC OF CUBA

To the Philippines were sent thousands of well-trained American teachers; but in Cuba, to disarm native suspicion of a desire to "Americanize" the island, it was decided that all teaching must be done by Cubans, and very few were prepared for the work. A helpful start was given, however, through an invitation from Harvard University (Governor Wood's alma mater) to Cuban teachers to attend the 1900 summer session of the university. As a result of the efforts of Charles W. Eliot, the president of Harvard University, a fund of $70,000 was quickly raised to bring twelve hundred Cubans to the United States for the course at Harvard and to enable them to spend a little time visiting some of the best American schools. This small army of educators with their new ideas, as well as the educational opportunities offered in Cuba for the first time, roused much enthusiasm for schooling, with the result that the enrollment of pupils reached two hundred and fifty-six thousand.

At least a generation of wardship under the United States would have been needed to give Cuba a chance of fair success in the difficult science of self-government; but the population as a whole was restive even before the short period of tutelage ended, and fearful lest American control become permanent. Had the domination of the island by the United States been much prolonged, friction would have increased, probably ending in revolt. Partly through realization of this, the American authorities gave the Cubans their freedom after a little less than four years of preparation to offset the tradition of almost four centuries of corrupt, inefficient government. But, as has already been stated, even this brief period of preparation gave Cuba an advantage over the other Latin-American states.

The country was fortunate also in having as its first president a man who was honest, intelligent, and anxious for the national welfare. Moreover, President Estrada Palma, through many years of residence in the United States as an exile from Cuba, had become familiar with republican institutions. Don Tomás, as he was familiarly called, was sixty-seven years old when he took office, and was described as of slight but erect build, white-haired, and possessed of a ruddy, kindly face. Simple and democratic in manners and tastes, when first he became president he rode to his office on the street cars.

In his relations with the United States the new executive was considered successful, for he negotiated two matters to the advantage of Cuba. One of these concerned the American naval bases called for by the Platt Amendment. In 1903 a treaty was signed with the United States whereby the latter secured sites in the harbors of Guantanamo and Bahía Honda on a rental basis instead of as out-and-out cessions, as some American naval men desired. Later, in return for greater advantages at Guantanamo, the United States gave up its rights in Bahía Honda. Despite the opposition of American producers, which was reflected in the Senate of the United States, the Cuban government secured a reciprocal tariff treaty providing for a 20 per cent lower rate for each country on various products of the other than was charged other nations, and a somewhat greater decrease on other American exports to Cuba. Sugar and tobacco were on the list of favored Cuban products.

In regard to another matter the Estrada Palma government was not so successful. This had to do with the ownership of the Isle of Pines, which lies near the southwestern coast of Cuba and which during the colonial period was administered as part of the larger island. An honest and reasonable interpretation of the terms of peace with Spain called for a grant of the little island to Cuba. Such a view was taken by the United States Department of State, which in July, 1903, signed a treaty with Cuba acknowledging the latter's sovereignty over the Isle of Pines. The American Senate, however, influenced by citizens of the United States who had settled on the island, failed to act upon the treaty before the time set for ratification had expired. In 1908 it definitely rejected a similar agreement, and it was not until 1925 that it ratified a treaty acknowledging Cuba's undoubted right of sovereignty over the Isle of Pines.

In domestic matters President Estrada Palma's basic policy was economy, with the aim of reducing the national debt and continuing the progressive measures introduced by Governor Wood. The great prosperity coming to the country—largely from increased crops of cane combined with a rise in the price of sugar as well as in the tariff rate—gave a surplus in the treasury for the purposes named. Therefore many public works, including roads, bridges, lighthouses, and government buildings, were planned and completed, the sanitary measures introduced by the military government were maintained and extended, and considerable was done for education; but the American plans for erecting more school buildings were somewhat curtailed, since after the first enthusiasm over education the attendance upon classes declined, as truancy from school was largely ignored.

Unfortunately, in his efforts to foster in Cuba orderly, honest progress Estrada Palma faced a formidable foe—greed and dishonesty in his own people. Many who had worked for "Cuba libre" were hungering for the spoils of office as the reward of their patriotic merit; hence public positions were filled with scores of unnecessary persons, for the president found it hard to work at all with his associates unless provision was made from the treasury for their relatives and friends. Congress showed more zeal for selfish legislation than for the general welfare. The desire it showed to secure more adequate pay for the men who had served in the army of independence was due to interest in the "soldier vote." As a result of the pressure it brought to bear for prompt action in this respect, the administration secured from a New York bank a loan for paying the soldiers instead of waiting for an accumulation from the national revenue, as President Estrada Palma had originally planned. In connection with the disbursement of the funds to the veterans, many frauds such as are found in the history of United States pensions were resorted to, as well as others more original. Furthermore, the sums voted for army officers were greatly out of proportion to those paid to privates. Not only did the central government show serious weakness, but the local administrative units likewise soon displayed inefficiency and corruption so gross as to make necessary the presidential intervention authorized by the constitution.

During 1904 the forerunner of serious trouble appeared. In February the first regular national elections to replace the short-term congressmen and other officers took place, and were so riddled by fraud on both sides as to be mere farces. The victory seemed to go to the administration faction known as the Conservative Republican party, but this was not conceded by the opposition Liberals, who consequently became more active against the government. The favorite device of the members of the opposition in the national house of deputies was to absent themselves from sessions in order to prevent the existence of a quorum. Hence months went by marked by deadlock in congress, and practically nothing was achieved.

The presidential election was to take place in 1905. Tomás Estrada Palma decided to be a candidate and was nominated by the Moderates, who succeeded the Conservative Republican party. In the campaign the opposing Liberals brought many charges against the president, but probably Estrada Palma's real sin in their eyes was his persistent attempt at economy; for unscrupulous politicians are prone to hate the man who looks upon public money as a public trust. The president, however, put himself in the wrong at this time by acting upon the advice of very unworthy Moderates in making new cabinet appointments, with the result that various unprincipled men were placed in offices which they used for the purpose of securing Estrada Palma's reëlection. The fact that the president was now seventy years of age may help to explain his weakness in this regard. During the campaign violence took place on both sides, and the Liberals talked freely of revolting if the election were "stolen" from them. On the election days they stayed away from the polls in large numbers, following a rather customary Latin-American procedure, and the Moderates resorted to the most extravagant frauds. Estrada Palma was reported elected, and was inaugurated in May, 1906.

Though there had repeatedly been strikes and slight insurrectionary movements during the first presidential term, there had been nothing threatening a real revolution. Now comprehensive plans were laid for a strong military uprising, for José Miguel Gómez, the unsuccessful Liberal candidate, and others of the party placed their hope in intervention by the United

States under the Platt Amendment. In August, 1906, the first armed disturbance took place, in the western end of the island at the town of Pinar del Rio. The revolutionary movement spread rapidly, for Don Tomás had feared the militarism which was the bane of other Latin-American countries and had not maintained a sufficiently large army to put down the uprising. On September 8 he asked aid from the President of the United States.

President Roosevelt was very reluctant to comply lest he contribute to the suspicion that the United States had dishonorable designs on Cuba. But within the next few days three more requests for intervention came from the Cuban government, the last of which stated that Estrada Palma planned to resign. Shortly afterwards William Howard Taft, the Secretary of War, and Robert Bacon, the Assistant Secretary of State, went to Cuba to study the situation. It did not take them long to decide that the elections had been dishonest; but the demands made by the Liberals that they be declared null and void did not seem to offer a solution of the problem, for there was no constitutional basis for such a procedure. Estrada Palma, on the other hand, stood out against a compromise measure proposed by the American officials, and a few days later he resigned,[1] as did also the vice president and the cabinet. Thereupon Secretary Taft, on September 29, 1906, issued a proclamation establishing a provisional government in the name of the United States; but the Cuban flag was kept flying.

The man appointed by the Washington authorities to head the Cuban government during the intervention was Charles Edward Magoon of Nebraska, who had been governor of the Canal Zone. He was in the position for a little over two years, and perhaps was, on the whole, conscientious; but he was an unwise choice. He did a good deal to encourage agriculture, industry, and commerce, constructed many public works, especially roads, secured the passage of a decree to prevent quorum-breaking in congress, and had the election laws reformed; but he was weak in serious ways. He was too free in granting pardons, he permitted much extravagance, and he was induced by the pressure of politicians to make many needless appointments. After his departure numerous serious charges were brought against him by the Cubans, including that of personal dishonesty in handling public funds; and in some of the school texts he is blamed for corrupting Cuban public morals by setting a bad example. Obviously the politicians of Cuba needed no aid in this direction. The historian Charles E. Chapman, who made a careful study of the charges, reached the conclusion that there was little basis for them. Any American sent at the time would probably have been maligned.

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[1] Shortly afterwards he went to his old home in Oriente, the easternmost province of the country, where he and his family lived in extreme poverty until his death in 1908.

In the latter part of 1908, national elections were held in Cuba in preparation for the restoration of independence, and José Miguel Gómez won. In the following January the American intervention ended. The new executive had been one of the leaders in the wars for independence, and was noted for his natural kindliness of disposition and rare charm of personality, qualities that made him liked by many who fully realized his faults. Some progressive measures were fostered during his administration. Agricultural schools were established in each province, road-building was continued, immigration was encouraged, and, in the interest of stimulating industry and commerce, the tariff laws were revised. But Gómez's administration was marked by much extravagance and dishonesty, local and national. The president himself was not free from either fault: he permitted and approved needless expenditures; and though he had entered the presidency a poor man, he left it a millionaire. The tone of Cuban social life also was lowered under Gómez through the restoration of the lottery and cockfighting, which had been abolished during the first American occupation.

Dissatisfaction grew; and by the autumn of 1911 two or three attempts at revolution had been made, but they had been nipped in the bud by the government. Near the close of the year more serious activities began against the administration, led by veterans of the wars for independence who resented the fact that numerous men who had sided with Spain in that conflict had been given office; but a veiled threat of intervention by the United States government caused the soldiers and the government to compose their differences. In the spring of 1912, however, came a real revolt from another dissatisfied element, the Negroes, who had borne much of the brunt of the fighting in the struggle for freedom from Spain and felt that they were not receiving their share of government offices and other blessings of independence. Fighting was for a time serious in the Oriente, where the Negroes were most numerous, but the uprising was put down before the close of the summer, after about three thousand of the insurgents had been killed.

Gómez hoped for reëlection in 1912, but the nomination of the Liberals went to Alfredo Zayas, already an enemy of the president. This led to a rift in the party, which deflected many votes to Mario García Menocal, candidate of the Conservative party, which had succeeded the Moderates; and he won the election. Menocal was apparently well equipped for his position. He was educated in the United States and had an engineering degree from Cornell University, he had rendered distinguished service in the wars for independence, and he had been for a time chief of police in Havana during the first American military government. Later he laid out in Cuba for the American Sugar Company a cane plantation which was at the time the largest sugar plantation in the world; and for some years he was its manager. He had doubtless more natural ability than Gómez, but he lacked the latter's personal charm and tact. Instead, he was high-handed in office, and quickly antagonized by trespassing beyond constitutional limits, especially after the election of 1914, by which his party lost control of congress. Not being able to get desired measures passed by the legislative body, he took it upon himself to issue executive decrees.

During his first three years in office, however, there was peace and order; but not much was accomplished that called for money, since even before Gómez went out of office the country was suffering from financial depression due to the low price of sugar, and the hard times continued because of poor sugar crops and the conditions produced by the World War. There was much unemployment in Cuba. The president tried to relieve this by launching a program of public works, but the effort failed because congress would not vote the needed appropriations. In these hard years, however, one notably good piece of legislation was passed: a law of 1914 which gave the country a national coinage, displacing that of the United States, which had passed as legal tender.

In 1916 prosperity came to Cuba with a rush; for the sugar crop of that year exceeded three million tons—by far the largest until then produced—and sold for a good price. The next year's crop was still larger, and the price continued to advance, going from an average of three cents a pound before the World War to twenty-two and a half cents early in 1920. The fame of this prosperity brought much foreign capital to the island and supplied a surplus for investment in other industries than sugar production. Cuban commerce expanded tremendously, and for a time the country had the largest per-capita trade in the world. Great fortunes were made in Cuba during this period, which has been referred to as "the dance of the millions," and there was an orgy of wild spending and wild living.

During Menocal's first term a good deal was done for education through the building of many primary schools and the founding of three normal schools. Various important public works also were undertaken. But the sums paid for the contracts, some of which were never executed, were scandalously high. Dishonesty, or extravagance which amounted to dishonesty, was found in most quarters and was particularly serious in connection with the expenditures on the new presidential palace. According to report $100,000 was spent on the equipment of linen for the building and $60,000 for a painting representing a battle in which Menocal had distinguished himself. Much of Menocal's share in such proceedings grew out of his willingness to provide for friends and relatives at public expense. The painter of the picture just referred to was a cousin. Whether the president stole public funds for himself is not certain.

Before the election of 1912 Menocal pledged himself not to stand for a second term, but he was so weak as to break his word under the urgings of friends and party leaders. The news of his candidacy was very unwelcome to many of his party, however, for they had come to dislike him. Hence serious factionalism developed among the Conservatives; but Menocal won the nomination, evidently by dishonest methods. Alfredo Zayas was again the Liberal choice. In the election, which took place on November 1, 1916, great numbers of fraudulent votes were cast, apparently by both sides; and when the earlier returns seemed to promise the victory to Zayas the Conservatives tampered with the later ballots. But no decision was reached, for packages of ballots from certain precincts in Oriente and Santa Clara were found to be missing. They were probably stolen by Conservatives, for the other ballots from these provinces showed the Liberals to be dominant there. The administration arranged to hold new elections in these provinces in February, 1917; but before the time for the balloting arrived the Liberals decided that the Menocal faction meant to win, by arms if necessary. Hence they began to plan for revolution.

Early in February the uprising began, and soon four of the six provinces were involved in it. Oriente was entirely in the hands of the insurgent Liberals, who set up a government there on the theory that they had won in the November elections. Evidently some of the leaders of the revolt hoped for intervention by the United States; but that government was on the verge of war with Germany and was unwilling to contemplate a prolonged disorderly or irregular state of affairs in Cuba. Furthermore, apparently there was a growing feeling in Washington that the Cubans should not be encouraged to prefer revolution to elections won by fraud, especially since fraud was commonly practiced by both sides. The factional conflict had already begun, however, when, on February 11, there was made public in Cuba a note from Secretary of State Lansing urging that the disputed election be settled by legal procedure. In two other notes issued within the next ten days Lansing declared that the United States supported only constitutional governments, and he denounced the insurrection as lawless. After the third note, the Washington authorities came out still more strongly against the revolutionists and backed up the government at Havana. The declaration of war against Germany by the Menocal administration on April 7, just one day after the United States had taken a similar step, doubtless had some politic intent with reference to the authorities in Washington.

The American government landed marines at various points in Cuba to protect foreign life and property, but did not interfere directly with the belligerents. Its moral support remained on the Menocal side, however, with a demoralizing effect on the revolutionary ranks. Ex-President Gómez fought on until he was caught and imprisoned; but Zayas quickly gave up the struggle, and others offered it only half-hearted support. Within a few weeks the government troops had crushed the uprising, but not until considerable property, including railroads and bridges, had been destroyed. Before peace was restored the Menocal government, against the urgings of the United States, had held the supplementary elections in Santa Clara and Oriente and easily won them because almost no Liberals went to the polls. On May 20, 1917, Menocal was inaugurated for the second time as president of Cuba.

During the next year and a half Cuba's attention was devoted largely to aiding the Allies in the World War. In general the policy of the United States in the conservation of food and the like was followed, but the country's special contribution was sugar, nearly four and a half million tons of which were produced in 1918. By arrangement made with England and the United States, this commodity was sold at a price favorable to the producers but not as high as could have been secured in the open market. To prevent any damage, through revolution, to the much-needed sugar, at Menocal's request the American government sent a considerable military force which was stationed in the disaffected eastern part of the island and remained there until 1922.

During his second term Menocal showed himself more dictatorial than before. The corruption of the government also became greater, and its constructive achievements less. Consequently many self-respecting Cubans became very weary of him long before the next election day. This situation heartened the Liberals, who now turned again to Gómez as their leader; but they wanted some assurance that the election would not be stolen from them once more. After some discussion both parties agreed to invite General Enoch Crowder, who had worked on the election tangle of 1906, to come to Cuba and help to formulate a new election law. Crowder accepted and arrived in March, 1919. After a new census of the country had been taken, he made a study of the different varieties of election frauds practiced in the past and helped to draw up a law aimed definitely at preventing a repetition of them. The Menocal government, however, made weakening changes in the measure soon after it was passed, and there was reason to suspect that in the coming election the same old practices would be followed.

The Liberals, who had nominated Gómez, believed so and indicated that they would not vote; but the United States government urged full participation and offered to furnish official observers at the polls to secure a fair election. The observers were sent in response to a request from Menocal (inspired by the authorities at Washington). Menocal himself did not attempt to secure election; but he backed Zayas, his former rival. The Liberals had rejected Zayas; thereupon he at first headed a small "Popular" party, but finally, encouraged by Menocal, became the candidate of the National League, representing the Popular and Conservative elements. The methods used by the Zayas-Menocal group to carry off the election took the form of violence and intimidation through the use of military supervisors, and were not such as the American watchers could prevent. On election day, November 1, 1920, blood was spilled in various places, especially in Santa Clara, where feeling was most intense. Here fourteen men were killed. The opposition had no chance to vote freely, and Zayas was declared victor.

The Liberals would not accept the outcome and, in accordance with the provisions laid down in the election law of 1919, appealed to the courts; but there were many delays, and 1920 ended without a decision. Fearing civil war, President Wilson, without consulting Menocal, sent General Crowder to Cuba early in January. The Liberals, who probably felt that intervention was their only hope, were apparently glad to see him, but the supporters of the National League obviously were not. Under a little pressure from Crowder, however, Menocal speeded up court procedure, and finally decisions were reached regarding the disputed cases. In general these favored the Liberals, but the court annulled the elections in about one fourth of the voting districts of the country, and it was decided to hold supplementary ones in these places on March 15. Menocal agreed not to employ military supervisors; but the Liberals became distrustful of the methods to be used—or fearful that Zayas would win in an honest supplementary election. Hence, hoping that the United States government would call a new election, they again stayed away from the polls. Zayas won, and since there appeared no reason for further intervention from Washington he became the next president.

Zayas proved the worst executive that Cuba has had. He was cowardly, weak, vicious, and generally untrustworthy; in fact, he seems scarcely to have had any standards of right and wrong. For the first two years after his accession Cuba was saved from the worst by the presence of General Crowder, who remained in an advisory capacity as representative of the president of the United States. Crowder succeeded in getting various measures adopted, especially along economic lines. These were much needed, for Cuba was in desperate financial straits. The sugar boom had burst in the summer of 1920, and the price had speedily dropped from twenty-two and a half cents a pound to less than four cents. The "dance of the millions" ended in dismayed haste: business was very hard hit, large numbers of people were ruined, and several banks finally failed.

To avert absolute disaster, the Menocal government had ordered a suspension of payment of debts, and this was in effect when General Crowder arrived in January, 1921. Under his advice the moratorium was continued for some time longer, and arrangements were made for installment payments of money due in business relations. Since the interest on the country's bonded debt was in arrears, an emergency loan of $5,000,000 was secured from the J. P. Morgan banking firm of New York to meet the need. But other financial obligations of the country, particularly the floating debt, seemed to make necessary much heavier borrowing in the United States. This fact gave General Crowder a lever with which he forced Zayas to agree to a number of reforms, especially in the way of eliminating extravagance and corruption from the government. When the changes demanded were made, or well under way, he recommended a loan of $50,000,000 for Cuba, and this was contracted for in the United States. Shortly afterwards Crowder withdrew as adviser to Zayas.

After this the American government left the Cuban politicians largely to their own devices, partly because of the denunciations brought against it in the United States as well as in Cuba for using imperialistic methods. Thereupon the Zayas government made short work of most of the reforms brought about through pressure from General Crowder and plunged into an orgy of maladministration and corruption. More than a dozen of the president's relatives whom he appointed to official positions seem to have contributed toward the general demoralization. Various instances of large-scale graft took place, one of which involved a vote of $367,000 to repair seven bridges later found to be nonexistent; another was connected with the purchase of the old Santa Clara convent for a government building, the appropriation bill calling for about a million dollars more than was actually paid to the owners of the structure. Finally Zayas crowned his public career by having a monument erected to himself. A marble statue of him (ostensibly paid for by the subscriptions of an admiring public) was set up just before his term ended. The park in which it was placed was purchased by a congressional appropriation of $36,000.

In trying to distract attention from the weaknesses and crimes of his administration, Zayas made a point of invoking nationalistic sentiment,—quite in harmony with Samuel Johnson's opinion that "patriotism is the last resort of a scoundrel." The

Liberal party, in particular, had opposed the Platt Amendment, and the Popular party headed by Zayas in 1920 had also had a plank against it. After getting into office Zayas lost few opportunities of calling attention to the danger from the United States and repeatedly urged the Cubans to assert their nationality. The wily president secured the repeal of some of General Crowder's wisest measures by attacking them as results of American intervention.

Though these devices added to the unpopularity of the Platt Amendment, they failed to increase Zayas's popularity; instead, the intelligent and respectable element in the nation displayed growing resentment toward the disgraceful condition of public affairs. The war veterans in particular were roused over the waste and corruption, for their pensions were in arrears. Hence in the summer of 1923 a Veterans' and Patriots' Association was organized to get justice for the soldiers and to bring about various other reforms. In April of the next year outbreaks took place in Santa Clara; but these were quickly put down because the United States government banned the sale of firearms to the insurgents, although it supplied Zayas with needed munitions.

Though elected upon a one-term platform, Zayas got himself nominated in 1924 by the Popular party, and, as in 1920, looked for the indorsement of the Conservatives. Menocal, however, received the indorsement of the latter, and the Liberals chose Gerardo Machado, who had served in Gómez's cabinet. Since Zayas had no chance of winning, he early gave up his candidacy and came out in favor of Machado. There was considerable campaign excitement and some loss of life in connection with the election; but, in the opinion of Charles E. Chapman, Menocal's unpopularity assured Zayas that it would not be necessary to use soldiers at the polls to enable his candidate to win. Therefore the election was, on the whole, free and comparatively honest. Gerardo Machado won by a very large majority, carrying all provinces except Pinar del Mar. He was unquestionably the popular choice.

When he learned of his defeat, Menocal conducted himself very well; for he gave no encouragement to those of his party who suggested revolution, and sent congratulations to his victorious rival,—an event unique in Cuban presidential elections and rare in Latin-American political history as a whole.

With Machado's inauguration there began an upward trend in Cuban affairs. Though the new president ruled virtually as a dictator, controlling the press and putting down opposition with a hard hand, corruption was less rampant than under Zayas, and more interest was shown in the general welfare. New emphasis was placed upon sanitation and health, the annual budget for this purpose being increased by $1,500,000. Though little additional attention was shown to education as a whole, much aid was given to vocational training by means of special elementary schools and advanced commercial institutes.

Machado had for some years been manager of the Cuban branch of the General Electric Company; he was, in fact, primarily a business man and devoted most of his energy to improving business conditions in Cuba. Though he was anxious for complete national independence, he felt that economic freedom from the United States was even more important than political emancipation. One matter of growing concern was the fact that most of the large industries of the country were in foreign hands, especially those of Americans, who had a total of more than a billion dollars invested in the island, about $600,000,000 of it in sugar production. Although foreign money had done much toward the development of Cuba, it was now felt that alien invasion had gone too far, since through it the Cubans had lost much of their birthright of natural resources and had to a large extent become merely the employees of foreign capitalists. In an effort to discourage further alien holdings, in 1928 a tax of 8 per cent was placed upon the profits of all corporations doing business in the country.

Foreigners of the tourist class were desired, however, and the Machado government aimed to make *tourisme* the country's second most important source of income. To this end extensive advertising was resorted to, and, partly in the interest of wealthy visitors, a program was pushed for the beautification of Havana. Before the close of Machado's first term the number of winter tourists to Cuba had reached sixty thousand annually,[1] a welcome financial aid to the country.

The most serious problem facing the administration was the general commercial depression caused by the continued low price of sugar, which, in turn, was caused by the American tariff and by competition from other parts of the world. It was decided to try to raise the market price of Cuban sugar by restricting the crop and by securing better tariff treatment for it. Yet little was accomplished in either direction. After three years of experimenting with limiting the output of the mills, the plan of restriction was abandoned in 1928; for the Cuban crop was not a large enough part of the world's sugar supply to make limitation effective, and in return for much cutting down of quantity there was but slight rise in price. Furthermore, the United States tariff on sugar (which was considered the real crux of the island's economic troubles, since it gave the Cubans little chance in the American market), despite urgings for a revision downward, remained at the same relative figure as was set in Estrada Palma's reciprocity treaty.

The other major part of the government's economic program was the plan to reduce the dominating position that sugar had held in Cuba for a hundred and fifty years by stimulating greater industrial diversity. Partly with this in view, work was begun on a long-projected central highway, from Pinar del Rio to Santiago via Havana, intended to serve as a traffic route alternative to the approximately three thousand miles of railway in the country. About a hundred and forty miles of the highway were completed in 1928; but in order to continue work on the road, Machado was forced to violate a resolve against foreign loans and to borrow $10,000,000 from a New York bank.

A more important measure aiming at better economic balance was the tariff law of 1927, which gave specific protection to numerous Cuban products. Under its stimulus new factories were established in different parts of the country, especially for the production of cement, shoes, furniture, perfumery, soap, and tobacco. Encouraged by the government, mining, which had scarcely existed during Spanish rule but had been growing since, became very promising; and iron, copper, manganese, coal, and asphalt were taken from Oriente in increasing quantities.

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[1] By the close of 1926 Havana had a population of more than 560,000, while that of the country as a whole was 3,470,217, an increase of over 100 per cent since 1899.

While the country was trying, with a little success, to make economic adjustments, agitation against the Platt Amendment continued in the Cuban press; and twice, during visits to the United States, Machado expressed the desire for its repeal. The American government made no responsive move, however, and it equally ignored repeated requests from Cubans for intervention against the tyranny of Machado's régime.

The most general resentment roused by the president during his first administration was probably that caused by his attempt to prorogue the national elections until 1930 by means of constitutional amendment. This move failed of national sanction, but an amendment extending the presidential term to six years was ratified. By the fall of 1928 Machado had the political situation sufficiently well in hand to secure unopposed election to this long term.

XIX

CENTRAL AMERICA

The ideal of uniting Central America under one government has been one of the strongest forces which have influenced internal politics and international relations in the Isthmus from the declaration of independence down to the present day.—DANA G. MUNRO, *The Five Republics of Central America*, p. 164

CENTRAL AMERICA had an advantage over most of the rest of Spanish America in that it secured independence practically without war and began national life free from debt and from such economic and social demoralization as was brought by the bloody strife of the time. Nevertheless troubles came quickly to the Central Americans owing to geographic factors making for separatism, ancient feuds, and sharply conflicting political theories.

In the national constituent assembly which proclaimed the independence of the captaincy-general of Guatemala two factions soon appeared: Conservatives, frequently called Serviles by their enemies, and Liberals, at times known as anarchists by their opponents. The Conservatives, who included some out-and-out monarchists, favored a centralized government and special privileges for the clergy and the lay propertied classes, who supplied most of their leaders. The stronghold of the element was Guatemala. The Liberals, who were much influenced by French revolutionary philosophy, desired social and political democracy and looked with suspicion on the power of the Roman Church. This faction, which drew largely from the creole mercantile and professional element, had supporters in all five provinces, but appears to have been especially strong in Honduras and Salvador.

Since the Liberals were dominant in the assembly, partly owing to reaction against imperial Mexico, a constitution was drawn up which federated the five provinces of Costa Rica, Nicaragua, Honduras, Salvador, and Guatemala. The president was to be elected by the bicameral congress, but he was given no veto because of Liberal suspicion of one-man power. There were to be two senators from each state, but in the house of deputies Guatemala's large population gave her seventeen out of the thirty-nine members. Guatemala City, the capital of the former captaincy-general, was made the seat of government of the new federation, an arrangement which revived old jealousy of that city.

The Liberal assembly also passed various progressive measures eliminating old evils, among them Negro slavery. The decree of 1824, which eliminated human bondage in Central America, affected only about a thousand blacks in all, but it is notable as being the first national emancipation measure passed in continental America.

Throughout the country the spirit of liberalism and democracy also showed itself in great enthusiasm for popular education. Schools of the Lancasterian type, then being introduced into the United States, were started in a number of the towns. In the absence of regular teachers government officials volunteered their services in intervals between other duties, and military commanders turned their barracks into classrooms and taught their Indian soldiers the three R's.

In addition to this zeal for enlightening the nation, the Liberals showed a rapidly increasing opposition to the Roman Church, and spread views that were considered atheistic by the alarmed Conservatives. Moreover, some of the worldly creole clergy in strongly Liberal sections showed much disregard for Church authority and tradition. In 1825 one such, Matías Delgado, a priest of Salvador, induced the local Liberal authorities to create that province into a separate diocese and appoint him as the first bishop. Since both the federal government and Archbishop Casaus at Guatemala City had opposed the formation of the new bishopric, a politico-ecclesiastical war soon began between the defiant Salvadorean Liberals, led by Bishop Delgado, and the federal authorities, urged on by the archbishop.

These hostile forces joined with others which were soon developed within the federal government itself. Manuel José Arce, elected president of the Central American confederation in 1825 by the Liberal congress, was supposedly of that political faction, but he quickly quarreled with the legislative body, aligned himself with the Conservatives, and proceeded to rule despotically. The renegade president added to the excitement and resentment of the Liberals in September, 1826, by arresting one of their prominent members from Guatemala on the ground that he was plotting revolt. Charges and counter-charges were made, and feeling became more bitter. In October an Indian mob, roused by the preaching of a friar against the dominant party as a destroyer of religion, murdered the Liberal vice-governor of Guatemala. This precipitated a general civil war between the two political factions, with Arce and the archbishop on the Conservative side and Delgado aligned with the Liberal congressional element. By this time local quarrels had broken out in the various provinces, and for the next three years the infant confederation reeled in the throes of anarchic warfare.

Early in 1829 the struggle ended, with the capture of Guatemala City by the Liberals, led by Francisco Morazán, a creole of Honduras with more than average character and ability. According to tradition the victorious general rode into the capital with the flag of the country in one hand and the federal constitution in the other. For about ten years Morazán was virtually dictator of Central America, at first as commander in chief of the army, with a puppet in the presidential office, and later as national executive elected by congress.

One of the first acts of the Liberal government was to expel Arce and various other Conservative leaders from the country. Archbishop Casaus and some members of the Franciscan, Dominican, and Recollect orders having houses in Guatemala City were also sent into exile, on the ground that they had worked to restore Spanish rule, which perhaps was true. As a further blow to the Roman Church in Central America, congress passed a law in September, 1829, prohibiting religious orders from existing in the country. Three years later it disestablished the Roman Church and declared freedom and protection for all religious groups. In its undermining of the Church the central government was aided by the states—also in control of Liberals, some of them far more radical than Morazán himself. Costa Rica and Guatemala, for instance, struck powerful blows by the elimination of many fêtes and saints' days, and Honduras reached the limit of disregard for papal authority by decreeing in 1830 that secular priests might marry and their children come under the general inheritance laws.[1] However, the measure was repealed the next year.

As soon as the Liberals had regained control they had resumed their progressive program, which had been interrupted by the apostasy of Arce. The confiscated buildings of the religious orders were converted into model prisons, hospitals, and schools in accordance with ideas brought from the United States by persons who had fled there to escape from Arce and had since returned. Projects for better transportation facilities were also made and were to include a canal across Nicaragua. The route was surveyed, and a treaty for the construction of the waterway was made with the Netherlands. Immigration was encouraged and agriculture was revived and extended.

Sweeping political changes took place also. To remove the friction caused by jealousy of Guatemala as well as to reduce the power of that province, the national capital was removed to San Salvador. A new penal code, to displace the Spanish legal system, was prepared for the country by translating and slightly modifying a set of laws drawn up by Edward Livingston of the United States. A habeas-corpus law also was introduced and, in three of the states, trial by jury.

Obviously Morazán and his associates were bringing about changes too rapidly for safety from drastic reaction. The reaction was hurried, however, by resentment over increased taxes and by the dictator's unwise and unjust treatment of Salvador. That state, still feeling that Guatemala was getting an undue share of the benefits of federation, seceded, but was coerced and brought back into the union by Morazán, who thereafter ruled it in a despotic manner. This caused a serious schism in the Liberal group, which needed all the strength that union could give to withstand the influence of the majority of the clergy, who felt outraged by the measures of the Liberals against the Church. Among the ignorant aborigines the orthodox priests constantly sowed the seeds of disaffection by telling them that the Liberal policies were intended to destroy the Indians' means of salvation. The grant of large tracts of lands to colonizing immigrants became another cause for resentment to the rank and file, who believed that the newcomers would rob them of their country. Finally, to those used to the simpler judges' trial the system of trial by jury seemed only a device for complicating and defeating justice.

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[1] The law was introduced by a bishop who had allied himself with the Liberals and sat in the provincial assembly.

Resentment against the Liberal government was apparently very general among the ignorant mass of aborigines by 1837, when the country was visited by cholera. This affliction gave unscrupulous priests a special opportunity to capitalize the ignorance and superstition of the Indians to the hurt of the government. There seems no doubt that some of the clergy told their humble charges that the disease was caused by a systematic poisoning of the drinking water by the foreigners and government authorities, with the aim of killing off all the aborigines, and that the physicians sent to fight the disease were merely helping on the murderous work.

The helpless Indians, believing that the Liberals were killing their bodies as well as trying to destroy their souls, were ready to turn in blind, fanatical frenzy against their supposed oppressors. Very soon they secured a leader in the person of Rafael Carrera, a Guatemalan of largely aboriginal blood who had been a pig-driver. Carrera was so ignorant that he could not sign his name, but he had a rare gift for directing and controlling the Indians. Evidently he believed the reports against the governing party; and the priests, seeing his influence over the natives, made him a tool to oust the Liberals by telling the Indians that he was their savior sent from on high. Some of the Indians had the impression that their leader was the Hebrew angel Raphael, raised up by the Almighty to preserve them from destruction, temporal and eternal; others called him *El Hijo de Dios* (the Son of God). Carrera very soon found himself at the head of a great rabble of excited Indians, who made up in crusading zeal much of what they lacked in military discipline. The battle cry was "Long live religion, and death to the foreigners!" The revolt spread, gaining strength rapidly, and early in 1838 Carrera entered Guatemala City, from which he gained money and arms. Morazán, coming from San Salvador, after trying unsuccessfully to bribe Carrera to make peace, defeated him and temporarily eliminated him.

However, the demoralization caused by the advance of the Indian army and by the general discontent had by 1838 led to a general spirit of secession and local independence. This the federal congress recognized in that year by passing an act instructing the provinces to "act as they thought best." By 1839, when Morazán's presidential term expired, most of the states had seceded or planned to do so. Intent upon restoring the federation, Morazán, instead of laying down his authority as the constitution demanded, took up arms and advanced against Guatemala City.

The Conservatives secured the aid of Carrera, and Morazán was badly defeated. When he returned to Salvador he was received coldly and even with insults, and therefore decided to withdraw from the country. He left for South America early in 1840. Two years later, at the request of a faction in Costa Rica, he went there, but his supporters turned against him; he was defeated, was condemned to death, and in September, 1842, was shot.

FOREIGN MEDDLING AND EARLY ATTEMPTS AT REUNION

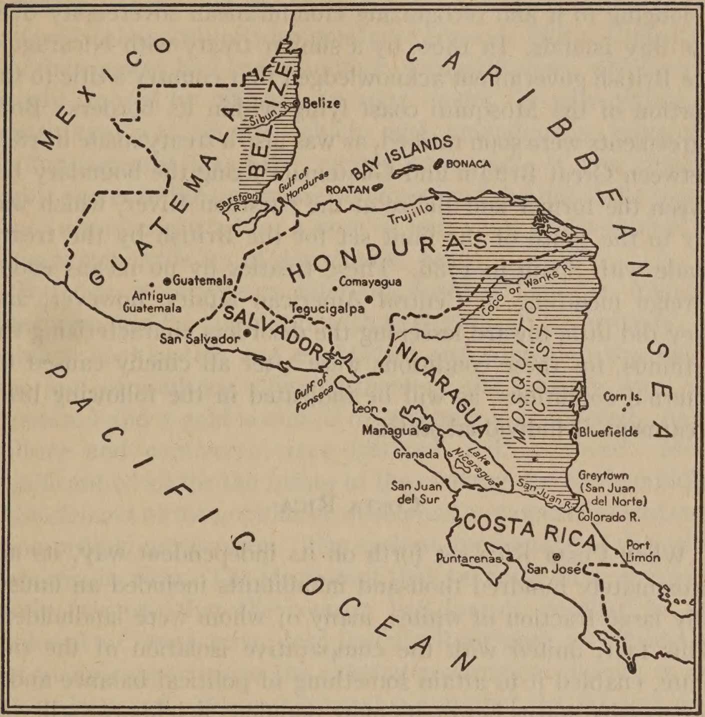
When the five Central American provinces became independent of the federation in 1838, there was a general assumption that when times were more favorable the union would be restored. Repeatedly thereafter, especially during the next twenty years, attempts were made to refederate. In such efforts the three central states—Salvador, Honduras, and Nicaragua—were especially active. They effected a momentary confederation in 1842, but it virtually died at birth because the members failed to keep the terms agreed upon. In 1849 a conference was held by the same states with the aim of reunion, and plans were drawn up but were not ratified by the state governments. Political jealousies and ambitions within the states as well as between them were too strong to permit a healthy, coöperative national spirit to exist; hence the states went their separate ways.

Still, the old spirit of comradeship was sufficiently strong among the various state groups of Liberals and Conservatives to cause a permanent international factionalism which became the bane of Central American politics. Liberals of one state went to the aid of those of another in their struggle with the Conservatives there, and vice versa. This procedure caused repeated revolutions and wars between the weak little countries and helped vary dictatorial monotony by political chaos and devastating slaughter.

The weakness and factional disorder that marked the states made them an easy prey to foreign influences, of which the British was at first the most aggressive and powerful. It worked largely through a revival and extension of relationships existing during the Spanish colonial era. When Central America became independent, the British protectorate of the Mosquito Indians (see page 176), though feeble, was still alive; and the British log-cutters of the Belize region had spread beyond the Sibun River, the southern limit of the settlement as laid down by treaty between Spain and England in 1786. The Morazán government had demanded that the loggers withdraw to the north of the river, but without success. Later it also tried vainly to get a settlement with England in regard to the Belize boundary and to eliminate the British hold upon the Mosquito coast. The only result was a British preference for the Conservative party, which was less suspicious of foreign influence than were the Liberals.

After the Central American confederation had fallen to pieces British aggressions increased, and British agents, instructed by their government, worked against reunion, since if the states were weak and isolated they would yield more readily to British interests and wishes. Subjects of Great Britain now established themselves in the Bay Islands, territory belonging to Honduras, which British interlopers had occupied for a time during the colonial period; and in 1841 the islands were placed under the control of the superintendent of Belize. In the same year British officials laid claim to the mouth of the San Juan River, in the name of the Mosquito Indians, and ordered the Nicaraguan authorities to leave the port. The latter failed to do so, but were left unmolested until the war between the United States and Mexico was drawing to a close. The British government clearly saw that the conflict would end by planting the United States firmly upon the Pacific coast, which would make a passageway across the Isthmus of first importance to that country. At the time the Nicaragua route, of which the San Juan River and Lake Nicaragua formed important parts, was considered the most desirable line for a canal. Great Britain, fearing that the new needs of the United States would lead it to seize and monopolize the route, on January 1, 1848, took possession of the river mouth in the name of "His Mosquito Majesty."

Against this high-handed move the feeble Nicaraguan government protested, and turned to the United States for aid against its foes; it even asked admission to the American Union for itself and for Salvador and Honduras. The United States government had no wish to acquire Central American territory; but, backed by an indignant nation, it was determined that England should not, under the flimsy guise of the Mosquito claims, monopolize the canal route across Nicaragua. So great was popular resentment in the United States and so insistent were the British upon holding what they had seized, that for a time war between the two kindred English-speaking peoples seemed likely. But calm was for a time restored by the negotiation of the Clayton-Bulwer Treaty, which was ratified in 1850. By this the British and American governments agreed to a neutralization of the proposed canal across the Isthmus and pledged themselves not to "occupy, or fortify, or colonize, or assume or exercise any dominion over Nicaragua, Costa Rica, the Mosquito Coast, or any part of Central America."


MEXICO
CARIBBEAN SEA
GUATEMALA
BELIZE
Belize
Sibun
Sarstoon R.
Gulf of Honduras
BAY ISLANDS
BONACA
ROATAN
Trujillo
HONDURAS
Wanks R.
Coco or
MOSQUITO COAST
Guatemala
Antigua Guatemala
Comayagua
Tegucigalpa
SALVADOR
San Salvador
Gulf of Fonseca
NICARAGUA
León
Managua
Granada
Lake Nicaragua
Corn Is.
Bluefields
San Juan del Sur
San Juan R.
Greytown (San Juan del Norte)
Colorado R.
COSTA RICA
Port Limón
Puntarenas
San José
PACIFIC OCEAN

CENTRAL AMERICA ABOUT 1850

Ruled areas show extent of British encroachments

Secretary of State Clayton, the negotiator on behalf of the United States, had expected by the insertion of the promise not to "occupy" to force the British out of the Bay Islands and the Mosquito territory; but the British authorities refused to withdraw, on the ground that the terms of the treaty were not intended to be retroactive. An angry discussion followed over the interpretation of the document, and for a time war again threatened; but the British government finally yielded to the American view.

In 1859 a treaty was signed between Great Britain and Honduras giving the latter control of the Mosquito territory belonging to it and recognizing Honduranean sovereignty over the Bay Islands. In 1860, by a similar treaty with Nicaragua, the British government acknowledged that country's title to the portion of the Mosquito coast lying within its borders. Both agreements were soon ratified, as was also a treaty made in 1859 between Great Britain and Guatemala fixing the boundary between the former and Belize at the Sarstoon River, which was far to the south of the limit set for the British by the treaty made with Spain in 1786. These treaties by no means ended foreign meddling in Central American affairs, however, and they did little toward lessening the disorders characterizing the Isthmus, for these conditions were after all chiefly caused by internal conditions, as will be indicated in the following brief treatment of individual states.

Costa Rica

When Costa Rica set forth on its independent way, its approximately hundred thousand inhabitants included an unusually large fraction of whites, many of whom were landholders. This fact, united with the comparative isolation of the tiny state, enabled it to attain something of political balance and a progressive status before its more populous neighbors; still, the Costa Ricans saw many a revolution before an approach to constitutional government was achieved.

During the early years after the overthrow of Morazán the Conservative element was in control much of the time, partly as a result of natural reaction. Nevertheless the Liberals repeatedly seized the reins of government; for during the first thirty years of Costa Rican independence the political game was played by a few powerful families of each faction, most of whom got a fairly generous share of the spoils of office.

Between 1870 and 1882, however, Tomás Guardia, the dominant politician of the period, brought about a change. Guardia was not connected with the former governing hierarchy; he resented its monopoly and proceeded to destroy it by confiscating the property of various members of great families and exiling them. As a result the small governing class was broken up and political opportunity became more general. Before Guardia's day the country had had a number of constitutions, which were largely ignored by officials. In 1871, under the new régime, a constitution was adopted which, with amendments, remained the fundamental law of the country until 1917. It gave considerable power to the one-house congress, and restricted the president (who was elected for a term of four years) by a council of government made up of department heads.

By 1902, twenty years after the death of Guardia, foundations were laid for a fair approach to republican government. A public-school system was established and education was made free and compulsory. The finances of the country were reorganized and a gold standard of currency was adopted. Agriculture and commerce were fostered and improved. Most significant of all for the future of the country, the basic middle-class element of the population developed a reassuring insistence upon orderly government. The earliest appearance of this attitude was in 1889. The election of that year, the first comparatively free one that the country had known, resulted in the choice of a Conservative, José Joaquín Rodríguez, as president; but many supporters of the existing government desired to retain it in power. When this became apparent the farmers prepared to march to the capital and do battle to put into effect the choice which they had expressed at the polls. This sturdy display of republicanism on the part of the country people, who were backed up by the outgoing president, enabled Rodríguez to take his seat without disturbance. Though a few revolutions have taken place since then, they have been discouraged by public opinion, and on the whole governmental changes have been orderly and progress has been fairly steady.

GUATEMALA

Guatemala has had fewer revolutions than the other Central American states, but has known more of the military despotism that crushes individual liberty. Three of the country's dictators ruled for a total of sixty-two years, most of the time as "constitutional presidents." Such long tenure of power was possible partly because Guatemala City, through being the colonial capital, gave the national authorities a tradition of strong government and partly because they put into their political machinery some of the devices employed by former royal officials. Guatemalan executives also quickly learned the value of a large army for maintaining control. Moreover, through suffering much from being on the losing side, many influential members of the upper classes early came to prefer a quiet life devoted to idleness or private economic pursuits rather than the precarious returns coming from adventures in politics.

The first of the long-dominant dictators was Rafael Carrera. He disappointed the Conservative aristocrats, who had planned to use him as a tool, by heading the government himself, and he displeased the Conservative clergy by refusing to give them back all their old privileges, though he restored religious intolerance. To Church taxes he was opposed. "If anyone wishes to employ a priest, let him pay for it," the dictator is reported to have remarked upon vetoing a bill intended to force the people to support the Church.

At the beginning of his power Carrera was evidently well-meaning, but he was far too ignorant to do more for his country than to give it comparative peace. For a time he had in mind to introduce a progressive economic program, but he did not know how to go about it; and though his assembly, made up of aristocrats and clergy, had some influence over him, it was too selfish to foster any movement for the general good. The Liberals had obviously no place in Carrera's government, and those of them who in any way roused his suspicion were brutally disposed of.

It was Carrera's policy to keep down Liberalism not only in Guatemala but also in the other Central American states. Because of its remoteness Costa Rica was little hampered, but he repeatedly interfered, even with armed forces, to prevent Liberal control in the three other countries; consequently the Conservatives were dominant in these during most of the quarter-century of Carrera's régime in Guatemala. In the view of the dictator and his Conservative backers the federal experiment and its attendant afflictions was also identified with the Liberal party; hence they opposed any suggestion of bringing Guatemala back into a union, and used their influence against the efforts of other states to reunite.

Carrera's death in office in 1865 gave the Liberals hopes of regaining power; they achieved this by revolution in 1871. Two years later their strongest leader, Justo Rufino Barrios, became president of Guatemala. Like Morazán, he set about weakening the Conservative element and placing the country again on the road to progress. The religious orders, which under the protection of Carrera had returned and become wealthy and powerful, were expelled from the country and their property was confiscated. A like fate befell various leading secular Conservatives. Once more religious freedom was decreed and the Roman Church was disestablished. The Carrera régime had done virtually nothing for popular education; the Barrios administration set about planning for schools throughout the country. It also encouraged agriculture and commerce, both of which were aided by the beginning of railroad-building. Unfortunately these plans for internal reform were not carried very far, owing partly to lack of funds and partly to Barrios's occupation with other interests.

One of these latter was the restoration of the Central American union. During a visit to the United States in the early eighteen-eighties Barrios tried to get the American government to use its influence toward bringing this about, but he received from it only sympathy and good wishes; therefore he went at the task himself. His original aim was to effect the union by negotiation; but when he found that Nicaragua and Costa Rica opposed his undertaking, he decided to use force. As a preliminary he issued a proclamation announcing the union of the five states into a republic and disclaiming all personal political ambition in connection with the move. Naturally the opposing states resented this action and suspected Barrios of aiming to make himself dictator of united Central America. Salvador, previously favorable, now changed sides and allied itself with Nicaragua and Costa Rica against Barrios. War began in March, 1885, and on April 2 Barrios was killed in battle against Salvador.

For a time after this there were comparatively frequent governmental changes in Guatemala, though the Liberals remained dominant; but in 1898, through assassination of the chief executive, the vice president, Manuel Estrada Cabrera, came into office and remained there for twenty-two years. During this period the country was nominally administered under a constitution drawn up in 1879 and later amended, which provided many liberal guaranties; but actually the government was a harsh military despotism which grew more severe as time passed and as the dictator's enemies increased.

When Estrada Cabrera came into office the presidential term was six years with prohibition against immediate reëlection. With the regard for the letter of the law that sometimes marked high-handed Latin-American officials, in 1903 he had a change made in the constitution that enabled him to succeed himself. Also, in accordance with the fundamental law, presidential elections were regularly held during this despotic régime, and in 1916 men of all classes were even driven to the polls by soldiers. But this procedure, though furnishing good training in the mechanics of voting, did not make for republican government, since Estrada Cabrera was the only candidate! By an elaborate system of espionage political enemies were discovered and afterwards jailed or sent into exile. It was perilous to discuss public affairs even in private, especially in the capital. Guatemala became a land of "mystery and whispers," and the educated class, through living under this political inquisition, suffered an intellectual atrophy in their attitude toward governmental questions, thus becoming less able than before to participate in republican rule.

Much was said in the subservient press about the progressive measures enacted by the dictator in the interest of education, transportation, economic development, and the like, but comparatively little was actually done for Guatemala along any of these lines.

In his relations with the European countries and the United States he got along very well, for he offered favorable opportunities for the investment of their capital; but in 1906 he was engaged in warfare with Salvador, Honduras, and Costa Rica because they aided his political enemies in an effort to overthrow him. The strife was ended through the efforts of President Roosevelt of the United States and President Díaz of Mexico, and peace treaties between the states were signed in September, 1906, on board the United States cruiser *Marblehead.* After that Estrada Cabrera maintained himself in power for fourteen years, but by 1920 his tyranny had so weakened his hold that a revolutionary group calling themselves Unionists were able to infect the national assembly and the army and overthrow him in April of that year.

Guatemala was in a badly demoralized condition when the change came. The currency consisted of dirty, tattered paper greatly depreciated in value; very little had been done toward rebuilding the capital, which had been destroyed by earthquakes in 1917 and 1918; there was general economic depression; and sanitary and educational conditions were very backward. The new Unionist president, Carlos Herrera, showed a progressive attitude, but was overthrown in December, 1921. His successor, Orellana, began various reforms. Two of the most important of these were in finance and education. In 1924 a new monetary system was introduced with the gold *quetzal* (equal to the United States dollar in value) as the unit, and plans were made for a circulation reserve fund. A serious effort was made to improve the quality of the schools and to increase their number. By 1927 the enrollment of pupils was 113,308, the largest the country had known.

SALVADOR

Salvador, officially known as República del Salvador (Republic of the Savior), is territorially the smallest country of Central America. Its soil is more fertile and its surface less broken by serious natural barriers than those of the other states, facts that help explain why its population is the densest on the

Isthmus and why its aboriginal and white elements are unusually well blended. The pure-bloods of both races form a small minority. This ethnic fusion and the geographic unity that fostered it helped to give the country a certain basic political harmony. Salvador has always been strongly republican in theory. Its vote for annexation to the United States in order to escape incorporation with Iturbide's Mexican empire will be recalled. More than any of its neighbors, too, it has been interested in Central American union; and yet it has been conspicuous for initiative and boldness of action.

Despite its broad unity of view, however, Salvador's career has been far from placid. During the first sixty years of sovereign independence uprisings and revolutions were very frequent. The Liberals struggled for power against the Conservatives, and often gained control, but in the days of Rafael Carrera their tenure was brief owing to his unfriendly influence. Excitement was also furnished by wars with Guatemala and Nicaragua, some of them provoked by Salvador itself.

During the past thirty-five years, chiefly because of a strong national army, no president has been overthrown by revolution, and governmental changes have taken place regularly. The present constitution, the sixth in less than half a century, was adopted in 1886, and provides for a legislature of one house and a president elected for four years. The choice of legislators and chief executive is supposed to be made by popular vote, but as yet the will of the people plays little part in the government of Salvador. Still, the maintenance of peace and order has made possible the economic and educational advancement of the country, and this offers promise of more democratic practices in the future.

Honduras

Honduras is politically the most backward of the five Central American states, a condition largely caused by its geographically central position and its comparatively small population, made up chiefly of aboriginal and Negro blood. The first fact has tempted meddling by Nicaragua, Salvador, and Guatemala in

Honduranean affairs; the relative weakness of Honduras has often made interference by these unneighborly neighbors effective. A large proportion of the country's very numerous revolutions and civil wars have been either provoked by the adjoining states or aided by them. During the past twenty years, however, owing to the influence of the United States, there has been much less outside meddling. Yet political conditions have shown little improvement. Much of the time from 1923 to 1925 the country was torn by warfare over the presidency. Today, after a century of independence from Spain, Honduras must be classed as a corrupt military despotism.

NICARAGUA

Nicaragua's history has likewise been very troubled; but since its contiguous neighbors, Costa Rica and Honduras, are weaker than it in population, they have not meddled very effectively in its affairs. However, what Nicaragua has lacked in stimulus to political trouble from adjoining states has been more than made up for by other factors. One of these has been the greater desire for office and spoils of office, due to the fact that Nicaragua's population is more urban than that of the other Central American states. Political interest has been especially stimulated by intense rivalry existing between the cities of Granada and León since early colonial days—a rivalry suggestive, in its bitterness, of the chronic hostility that separated various north-Italian cities during the Middle Ages. León, the capital of Nicaragua when it was a colonial province, has been the cultural center of the country and the Liberal stronghold, drawing support from small landholders and professional people. Granada, fortunately situated at the head of Lake Nicaragua, early gained wealth through commerce and established an aristocratic tradition, causing it to become the center of political Conservatives, made up of large planters and prosperous merchants. Granada's jealousy of León apparently began when the latter was made the seat of Spanish control in Nicaragua; since the control ended, there have been repeated wars between the two cities, usually provoked by quarrels over national politics. One result of this conflict has been the repeated shifting of the country's capital between León and Managua, which is in the Conservative section.

The fact that Nicaragua possessed a water route very useful for interoceanic travel also caused that state much trouble, directly and indirectly. England's claim to the San Juan River in behalf of "His Mosquito Majesty" has already been mentioned. Long before the British authorities were forced to withdraw and leave the Mosquitos to Nicaragua, the San Juan had become part of a highway across the Isthmus used yearly by thousands of adventurers pouring into California's gold fields. To meet the immediate demand for transportation facilities caused by the gold discoveries, an American company which had secured from Nicaragua a concession to build a canal formed an accessory transit organization to carry passengers across Nicaragua. This operated by means of small steamers on the San Juan and Lake Nicaragua, supplemented by a coach line running from the lake to San Juan del Sur. Repeated quarrels took place between the officers and employees of the Accessory Transit Company, which was headed by Cornelius Vanderbilt, and the authorities of the town of San Juan (renamed Greytown by the British), at the mouth of the river. These disturbances and the low character of many of the passengers who paused in Nicaragua on their way to or from California tended to add to the demoralization and political confusion of Nicaragua.

More serious difficulties came from another quarter. In 1854 a fierce war was under way between the two political factions of the country. The Conservatives, aided from Guatemala, were gaining the upper hand when the Liberals appealed to William Walker, a Tennessee adventurer who had filibustered in Mexico, to come to their aid. Walker responded, and in the summer of 1855 he arrived in Nicaragua ostensibly to support the Liberals of León but actually to further his own interests. His original thought seems to have been to get control of Nicaragua in order to bring about its annexation to the American Union for the purpose of strengthening the hold of slavery there. With this object to the fore he had little difficulty in getting supplies and men from the United States, especially since just at this time American public opinion rather favored meddling in Central American affairs to offset England's objectionable interpretation of the Clayton-Bulwer Treaty and its continued hold on the Mosquito coast and the Bay Islands. Walker also had aid from the officers of the Transit Company.

Within a few months he had military control of Nicaragua and, as commander of the strongest army, soon became chief politician of the country. By June, 1856, he had decided that Nicaragua was too good for the "Yankees" and had made himself president of the country with the intention of keeping it independent. Unfortunately for his ambitions, he gained the enmity of Cornelius Vanderbilt, who struck him a serious blow by seizing vessels bringing him reënforcements and supplies. To make the filibuster's ruin certain, Vanderbilt also stirred up the other Central American states against him. Costa Rica, which had a serious boundary dispute with Nicaragua, early had an army in the field, and the three other states later sent forces against Walker. In May, 1857, he was defeated, surrendered to the commander of an American vessel, and left the country. Twice after this he tried to return and regain control, but without success, and in 1860 he was finally eliminated by being shot in Honduras shortly after landing there.

As was to be expected, when the Nicaraguans were again left to themselves there was a reaction in favor of the Conservatives, who retained control for thirty years thereafter and gave the capital its permanent location at Managua. This period was one of peace; for the presidential office was quietly handed from one Conservative leader to another, and there was no revengeful treatment of the Liberals. Considerable progress took place during these three tranquil decades, for the executives were on the whole honest and efficient men.

This period of peace and progress came to an end because the president, Roberto Sacasa, a member of the small Conservative minority of León, appointed some of his own townsmen to high public office; consequently he was overthrown in 1893 by the jealous Granadines. This caused a rift in the Conservative faction, and the Liberals were enabled to gain control and to place in office José Santos Zelaya of Managua. Zelaya succeeded in maintaining himself in power for sixteen years.

Though he fostered the progress of the country in various ways he was cruel and tyrannical, especially toward the Conservatives; he granted economic monopolies and concessions with lavish hand to his friends; and he set a new record in Central America for the stealing of public money. Furthermore, he had almost a mania for meddling in the politics of other nations. Starting revolutions in other states was a variety of office sport with him; he promoted them not only in the four Central American countries but even in Colombia and Ecuador. He was suspected of aiming to restore the Central American union, evidently with the object of ruling it himself; and in 1907 he was at war with Honduras, where he had set up a puppet president, evidently in furtherance of this plan. This strife was ended chiefly through the good offices of Presidents Díaz and Roosevelt, under whose auspices a conference of the Central American states was held in Washington late in the same year.

The object of the gathering was to bring about conditions more favorable to peace and progress in Central America, and all five states were represented. Many matters were discussed and treaties were made for the encouragement of later federation and the prevention of war. With federation in view, all participated in various unifying agreements in regard to currency, communications, tariffs, and similar matters. In the interest of the prevention of war the countries pledged themselves not to meddle in the affairs of their neighbors, agreed to the neutralization of Honduras, and made arrangements for the creation of a Central American court of justice in which all disputes between them were to be settled. The court was soon provided for, with its seat at Cartago, Costa Rica, in a building erected with money given by Andrew Carnegie.

Despite pledges given and taken, Zelaya continued to stir up trouble in the states of the Isthmus. This finally caused the American Secretary of State to give the Nicaraguan chargé his passports and to denounce Zelaya as a "blot on the history" of Nicaragua. This pressure, combined with civil war, led Zelaya to resign in December, 1909, and leave the country. Doubtless the nation was glad to be rid of him; but the assembly, although accepting his resignation, protested formally against American intervention in Nicaraguan affairs.[1]

Soon after Zelaya's departure the Conservatives, who were more favorable to the United States government, came into power. The country was in a bad financial condition at the time. Various foreign creditors were clamoring for settlement, and money for making payment was lacking. The government appealed to the United States for aid; and Thomas C. Dawson, who had recently instituted financial reforms in the Dominican Republic, drew up a plan on the same general basis to meet Nicaragua's needs. The treaty founded on the Dawson plan provided for a loan, secured by Nicaraguan customs, from New York bankers; for the placing of the collection of customs in charge of a collector-general approved by the United States government; and for the creation of a commission to investigate the claims against Nicaragua.

The American Senate refused to ratify the agreement; but before its action President Taft appointed a collector-general of customs, and a commission was created which later scaled down and adjusted the financial claims against Nicaragua. Through the efforts of the State Department at Washington, American bankers also made some preliminary loans. However, after the Senate had failed to approve the treaty they refused to extend the remainder of the loan originally planned. Later the Nicaraguan government was able to secure smaller sums by other arrangements, including a pledging of the railroads of the country for the debt.

In 1912 factional warfare broke out in Nicaragua, partly over the rejected treaty, toward which the Liberals felt strong resentment; and the United States landed marines, who took part in the struggle and defended the Conservative government against the anti-American forces. In September, 1912, during the disturbance, a note of warning was issued from Washington declaring that under the Washington treaties of 1907 the United States considered that it had a "moral mandate" to try to preserve peace in Central America; it would therefore aim to foster true constitutional government and free elections, and to this end would support established governments against revolutions based upon the selfish designs of would-be despots. If necessary, force would be used to protect American legations. This pronouncement merely increased the suspicion and resentment felt in Central America toward the United States, especially on the part of the Liberals.

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[1] The increasing participation of the United States in Central American affairs was made possible, as far as Great Britain's rights were concerned, by the fact that the Clayton-Bulwer Treaty was abrogated in 1902 (see page 508).

After order had been restored, a "legation guard" of about a hundred American marines was maintained in Nicaragua for many years, its main purpose being to supply a "stabilizing influence" to Nicaraguan politics by giving pause to unfriendly Liberals who might aspire to get control of the government through revolution. As a result Conservative presidents, who were little more than puppets of the United States government, succeeded one another; for they and their party controlled the machinery of election.

In the first part of the Wilson administration a canal treaty that would have made Nicaragua a protectorate of the United States was signed with the subservient government of the state; but the American Senate failed to ratify the agreement. Later the arrangement was modified and the protective features were omitted, leaving merely the provisions regarding the canal. The agreement, known as the Bryan-Chamorro Treaty, was ratified in 1916; it gave to the United States the exclusive right to build a canal across Nicaragua, together with a lease of the Corn Islands on the east coast and a site on the Gulf of Fonseca, near the proposed western terminus, for naval bases, to insure the protection of the canal. In return the United States was to pay Nicaragua $3,000,000, to be spent under American supervision.

When the treaty was before the United States Senate, Costa Rica protested that its joint rights with Nicaragua to the San Juan River were not recognized by the agreement, and Salvador held that a naval base on the Gulf of Fonseca would impair its sovereignty. In consideration of these objections the Senate included in its resolution of ratification a statement that nothing in the treaty with Nicaragua was meant to affect any existing right of the other Central American states. The protesting states found this quite inadequate, however, and submitted their complaints to the Central American Court of Justice. Nicaragua made a defense before the tribunal, but the judges from the other states reached the unanimous decision that Nicaragua in entering into the Bryan-Chamorro Treaty had violated the terms of the agreements made at the Washington conference of 1907. Nicaragua, however, ignored the findings. Before this various minor cases had come before the court, and its decisions had been accepted by the parties concerned; but now the defiant action of a member nation in a major case gave the tribunal its deathblow, and when its original lifetime of ten years was about to expire no move was made in Central America to provide for its continuance.

Since the ratification of the Bryan-Chamorro Treaty, Nicaragua has suffered numerous domestic vicissitudes, partly caused by financial straits. At the time the agreement was made the country was being pressed by foreign creditors, and money to pay government employees was lacking. Therefore the $3,000,000 to be paid Nicaragua under the treaty was much needed; but more than two thirds of the sum (which had to be disposed of with American approval) went toward settling the most pressing foreign claims. Official financial advice from the United States was provided by a high commission on public credit created in 1917, in which American influence was dominant. The commissioners not only passed upon the disposal of the canal fund, but had power to revise both the foreign and the domestic debt and arrange for payment. Naturally they worked in close coöperation with the American collector-general of customs. On the whole the commission did well, and by 1924 it had Nicaragua freed from serious financial embarrassments and on the road to prosperity.

The so-called legation guard of American marines had been continued; but in February, 1924, Secretary of State Hughes announced that it would be withdrawn after the installation of the new president, who was to be elected in October. An election law drafted by an American expert had been adopted in 1923, and the Conservative president appeared anxious to have the election as fair as possible, since the actual withdrawal of the marines would probably depend upon an orderly and honest choice of president. Difficulty seemed to be threatened by the fact that both political factions split. However, the election was declared the most honest that had taken place in the country, and it resulted in the victory of a coalition ticket, with Carlos Solórzano, a Conservative Republican, as president and Juan B. Sacasa, a Liberal, as vice president. The new officials were quietly inaugurated in January, 1925, and in the following August the American marines were withdrawn from Nicaragua. Before they left, trouble was brewing; for Solórzano was weak, and his position was especially difficult because of the coalition character of the executive ticket. The two factions struggled for spoils and power. Three weeks after the marines departed a Conservative group arrested a number of prominent Liberals. The president was evidently unwilling to meet fairly the crisis caused by this action, and in October the defeated candidate of the regular wing of the Conservatives, Emiliano Chamorro, got control of the fortress La Loma, thereby gaining complete power over Solórzano. Fearful for his life, Sacasa, the Liberal vice president, fled from the country.

Chamorro soon induced Solórzano to resign, and himself assumed direct control of the government; but the authorities of the United States refused to recognize him. In the late spring of 1926 fighting began between the Sacasa and Chamorro factions, and American forces were again landed in considerable numbers. Through the efforts of the United States an armistice was declared in September, and the American chargé tried to secure a political adjustment. Since Sacasa had not resigned, in the opinion of many critics of what followed he should have been given the presidency, for he was out of the country merely because his life had been in danger. Nicaraguan leaders, however, proceeded, with the approval of the American diplomatic representative and the authorities at Washington, as if both presidency and vice-presidency were vacant. Congress was called in special session and elected Adolfo Díaz, a Conservative who had before been president of the country, to fill out Solórzano's unexpired term. Díaz took office on November 14, 1926, and was promptly recognized by the United States.

Sacasa, whose indignation over this turn of affairs was great, established himself on the east coast of the country as "constitutional president" and was recognized by Mexico. Fighting was resumed between the Liberals and Conservatives. Soon American troops were landed by thousands and proceeded to protect the Díaz government as well as foreign lives and property. General criticism from abroad, especially from Latin America, was consequently showered upon the American government.

In April, 1927, President Coolidge sent down Henry L. Stimson, who had been Secretary of War under Taft, to study the situation and try to make adjustments. Stimson decided that Díaz should complete his term and that the opposition should be disarmed. After a time Sacasa agreed to give up the struggle, as did the other Liberal leaders except Augusto Sandino, whose forces resisted the American marines for more than a year.

One of the inducements to the laying down of arms was the promise of an election under American supervision in 1928, when Díaz's term should end. In an effort to guard against fraud a new election law was passed. The supervision of the balloting was in charge of an officer of the United States army, and, to prevent repeating, voters were required to stain their fingers. Apparently very little fraud took place. The victory went to the Liberals, with José Moncada, one of the leaders of the insurrection against Díaz, elected by a large majority.

RECENT ATTEMPTS AT REUNION AND PEACE

While Nicaragua, under the tutelage of the United States, was struggling to gain a sounder financial status, Salvador, hoping to secure greater order and strength for Central America, revived the plan of refederation. With the aim of celebrating the centenary of independence by a united Central America, negotiations began between the states, and a preliminary agreement was reached in January, 1921. This provided that when the treaty of union was ratified by three states it should go into effect. To guard against the development of a dictatorship over the united countries, it was agreed that the federal executive authority should, as in the case of the Swiss confederation, be vested in a council. Honduras was favorable to the plan of reunion, as was Guatemala, then under Herrera, who had recently succeeded Estrada Cabrera; but Costa Rica, reluctant to join with states all of which were more backward than she, failed to ratify the pact, and Nicaragua kept entirely aloof, apparently owing to the fear that by uniting she would lose some of the benefits to come from a canal across her territory.

The other states, however, proceeded to form the nucleus of a federation by electing officers and choosing Tegucigalpa, the capital of Honduras, as the seat of the union government. On Centenary Day, September 21, 1921, the Central American flag was unfurled and the "Republic of Central America" was proclaimed amid great rejoicing, especially in Salvador and Honduras; but within a few months the embryonic federation was again wrecked by the overthrow of Herrera in Guatemala and the accession of Orellana, who was opposed to reunion.

The United States, because of its recognition of Orellana upon his election as president, was bitterly blamed by Central American Liberals for preventing the plan of refederation from being a success. This denunciation implies that but for American action the new republic would have been permanent, a view quite unjustified by past history or present conditions. There does not exist a Central American national self-consciousness, without which no voluntary federation can be maintained. The needed sense of national unity cannot be secured except by the spread of general education and intelligence and by the close connection of the states by modern methods of communication and transportation, both of which are now lacking. A further obstacle to Central American union is the existence in all the states of numerous politicians who, despite their assertions to the contrary, are selfishly opposed to federation, for it would mean fewer dominating offices, less power, and perhaps less opportunity for graft. Only military coercion by the United States could, at the present stage of Central American development, bring about and preserve a federation of the states; such an arrangement would be satisfactory to no one.

While the preparations for reunion were being made, something approaching peace existed between the Central American states. By the time the three federated states had resumed their sovereignty in February, 1922, international trouble was brewing. Soon afterwards uprisings aided from Honduras took place in Nicaragua, similar disturbances occurred in Honduras through Nicaraguan aid, and Salvadorean political refugees in Honduras were preparing with the aid of sympathizers in that country to overthrow the president of Salvador. Through the efforts of the United States these various hostile activities were stopped, and a Central American conference was held in Washington in the winter of 1922–1923 with the aim of making the treaties drawn up there in 1907 more effective.

All the states were represented; and though prolonged discussion took place and some opposition was displayed, the gathering reached numerous agreements. A new general treaty of neutrality to terminate political meddling was adopted, provision was made for the creation of a Central American court of justice in which the United States was to have a definite part, and all the countries agreed to work for the limitation of armaments in Central America. In addition, many minor arrangements were made, most of them concerned with economic development. The governments concerned finally ratified almost all the treaties; the last to act was Honduras, which was delayed by revolutionary struggles, but early in 1926 finished giving its approval of the treaties. By the autumn of 1929, however, little had been done to put the arrangements into practical effect.

ECONOMIC AND EDUCATIONAL DEVELOPMENT

The political history of a country is a fairly accurate index to other aspects of its career; for without stable, efficient government little progress of any kind is possible. The Central American states are no exception: those with the worst political records are, generally speaking, the most backward in other regards. This is especially notable on the economic side. Most of the states have had serious financial difficulties of one sort or another, and all have rather heavy debts; but Honduras has been the worst off, and for more than half a century was in a bankrupt condition, owing chiefly to a loan secured in England in the eighteen-sixties for railroad construction which never took place. By 1926 this debt, with accumulated interest, was reckoned as amounting to about $150,000,000. In that year, through efforts of the United States, an adjustment was made whereby the British creditors were to be satisfied with a total of $6,000,000, to be distributed in semiannual installments over a period of thirty years. The money was to come from a 3 per cent income tax and was to be collected by the National City Bank of New York. In a dozen years of partial or complete American control of Nicaragua's debt adjustments its obligations were reduced from more than $32,000,000 in 1911 to less than one fourth of that amount in 1924. Of the five states, Guatemala, in part because of the long periods of peace under dictators, is the best situated as regards debts, foreign and domestic.

All the Central American countries are rich in natural resources, but these have been little developed. The chief industries have always been mining, exploiting forest products, ranching, and farming; but the largest enterprises have generally been in the hands of foreigners, for the nationals lack both capital and ambition. Though a little gold-mining is carried on in all the states, the richest deposits of gold and also of silver have been found in Honduras. During the middle of the nineteenth century placer gold-mining in the Olancho district of the country absorbed considerable attention, and silver-mining has been carried on for many decades in the Tegucigalpa section. When the price of the metal fell toward the close of the last century, many of the smaller, more primitive works were abandoned; but since that time the Rosario Mining Company has annually sent out ore to almost one fourth of the total value of the national exports.

Dyewoods, cedar, and cabinet woods, such as mahogany and ebony, are especially abundant in Honduras, and these have been a source of revenue. In some of the more precious woods the other countries, especially Guatemala, are rich. On the coast of Salvador grows the rare tree producing the gum known as Peruvian balsam, one of the important commercial articles of the country. The wild rubber trees found in most of the states have long been tapped and are about exhausted.

Cattle-raising has for centuries been an important occupation throughout Central America, especially in the rougher, more broken parts, but the breeds are usually poor. Recently, however, the governments of Salvador and Costa Rica have begun to give attention to improving the stock through the introduction of schools of agriculture.

More important is the cultivation of the soil, which early became the primary economic occupation of the Central Americans. Because of the fertility of the land and the varied climate, much diversity of crops has been possible. Soon after independence indigo-planting began to expand, and for a while this was one of the important tillage products. During the second quarter of the nineteenth century Guatemala introduced the cochineal insect and made extensive plantings of the nopal cactus for nourishing it; but with the coming of chemical dyes the industry was ruined and was replaced by others. To some extent all the states produce coffee, cotton, maize, cacao, coconuts, sugar cane, bananas, tobacco, and rubber. In most of them rubber-planting is increasing, and also cotton-growing, which has been receiving encouragement from the more progressive governments. In Central America as a whole bananas and coffee are the two leading agricultural products, with cane sugar as an important third. Coffee-planting, which is carried on in the higher, cooler altitudes, was introduced about a century ago, but it has spread greatly during the past two decades, especially since German capitalists have become interested in it. The banana industry began to develop about twenty-five years ago under the stimulus of American capital, and now vast plantations producing many millions of bunches of fruit a year are to be found on the hot, moist northern coasts.

Manufactures occupy comparatively little attention and are mostly consumed locally. They consist largely of cigars, sugar, rum and brandy, roughly made lumber and furniture, textiles, hats, and shoes.

The exports of the Isthmian states, which have always been limited to natural and agricultural products, have increased much during the past quarter of a century, largely because of the greater degree of peace and order and the expansion of coffee and banana growing by means of foreign capital. The leading export is bananas. In consequence of the peace produced by the presence of American marines the commerce of Nicaragua showed especially great expansion and considerably more than doubled.

One of Central America's greatest economic handicaps has been the lack of modern transportation facilities. Since no part of the territories of Salvador and Costa Rica lies far from salt water, where connection can be made with ocean steamers, they have fared less badly than the larger states; but in all five a large part of the produce is still brought to the ports by methods used in colonial times, and in some of them the roads over which the oxcarts pass are no better than in that period. However, Nicaragua, Costa Rica, and Salvador have paid considerable attention to road-building during the past ten years or so. Railroads have been constructed for their own use by various foreign capitalists, such as the banana companies; and in all the countries there are short public lines, most of them laid during the past forty years. Costa Rica, Salvador, and Guatemala are the best supplied with railroads: the capitals of Costa Rica and Guatemala are connected by rail with both oceans, and Salvador has two lines—one running east from the capital and the other west from it. More than half of these are owned or controlled by foreign corporations. The Costa Rican line from the capital to Port Limón, opened for use in 1890, was in 1905 leased for ninety-nine years to the United Fruit Company, an American concern. Salvador's eastern road and the lines of Guatemala have been under the control of the International Railways of Central America, which is affiliated with the United Fruit Company. Salvador's western line is British-owned. The southern part of Nicaragua is served by railroads running from Corinto to Granada and by boats on the lakes. Honduras has but little railway mileage. Up to the autumn of 1929 no two of the Central American states were united by railroads, though a line connecting Guatemala and Salvador was almost completed. Some of the countries most backward as regards railroad-building have recently shown interest in newer methods of transportation. Honduras is an instance; for the capital, which has no railroad lines to the coast, has for several years been connected with the Gulf of Fonseca by a good motor road, over which lines of autobusses run regularly, and with the gulf on the north by an air line. Very recently all the countries have developed interest in automobile and air transportation.

Most of the unskilled labor in Central America is done by aborigines, mestizos, zambos, and Negroes from the West Indies. The Negroes are largely found on the banana plantations of the north coast, especially in Costa Rica. Though wages have always been low, the workers have been free to come and go, except in Guatemala, where there has long existed a degraded system of peonage (really debt serfdom), which replaced the *encomienda* of colonial days. This evil was made possible by the fact that agricultural labor was very poorly paid, and it was easy for the worker to get into debt to his employer, who tried to keep him so, since the law gave the creditor control of his services until the debt was paid. One of the most common causes for indebtedness is the plantation store, at which the worker is expected to buy his supplies, usually at considerably higher prices than those charged in the nearest villages, and where he is encouraged to spend his money for liquor and luxuries. Since the great extension of coffee-growing in Guatemala, serfdom has become more general and more severe, steadily reducing the number of free Indians.

During the century since independence from Spain the population of Central America has increased perhaps 500 or 600 per cent and is now estimated to be about 6,000,000. Costa Rica, the smallest in population, has about 500,000 inhabitants, and Guatemala, the most populous, approximately 2,500,000. Most of the growth has been due to natural increase, for the contribution from outside has been comparatively small.

Perhaps 75 per cent of these six million persons are illiterate. In 1893 it was reported that 90 per cent of Guatemala's inhabitants could neither read nor write. Probably the situation was about the same in all the countries except Costa Rica, where the literacy was greater. During the past thirty-five years educational progress has been made in all the states, especially in Costa Rica, where recently the fraction of the children in the schools has been high; but a large proportion of the inhabitants are still illiterate. Throughout Central America the primary schools are quite inadequate to the needs of the children, and are in general poorly equipped and poorly taught, except in the case of Costa Rica, where in the cities education is progressive. Though secondary schools are found in all the countries, they are very few in number and, as in many Latin-American countries, give unusual attention to memorizing facts and neglect to train the pupils to think. All the countries possess normal schools and professional institutes, as well as provision for vocational training, but there are no facilities for giving instruction in the liberal arts beyond the secondary school. In Guatemala City there are a conservatory of music and an art institute, and in all the countries there are a few libraries; perhaps the best is the Biblioteca Nacional of Costa Rica in San José, which under the management of Dr. García Munge, one of the leading Central American scholars of the last decade, was made useful in a modern way, whereas most libraries of the Isthmus have remained chiefly mere repositories of books.

XX

MEXICO: EMPIRE AND REPUBLIC

Throughout the whole period of Mexican independence runs this baneful influence of personalism, finding public expression in pretended aspiration for either centralist or federalist control, as the political accident may dictate.

HERBERT INGRAM PRIESTLEY, *The Mexican Nation*

THE ERA OF SANTA ANNA

MEXICO alone of the eighteen states originating from Spain's colonial empire tried a monarchical form of government. Twice it set up a crowned ruler, and the royalist tradition lingered long.

If the plan to place a European prince at the head of the state had been put into effect at once upon the overthrow of Spanish power, Mexico would probably have fared better politically than most of the remainder of the Indies. As it was, its first century of national history was especially unfortunate. Perhaps no ruler, however able, who lacked the prestige of royal blood would have met with success as the crowned sovereign of the country; but Agustín Iturbide was a particularly unfortunate person to begin the monarchist experiment, for he was vain, ambitious, selfish, unscrupulous, and utterly lacking in executive ability.

These facts and his thinly veiled seizure of power in themselves foretold trouble; and this was not long in coming, since he was opposed by the Bourbon monarchists and the radical republicans from the first. Within a few weeks the latter were discovered in a plot to overthrow the empire. Iturbide, suspecting fifteen members of the constituent congress to be implicated, threw them into prison and kept them there, though no proof of their guilt was found. This action on the part of the emperor turned the whole congress against him; quarrels soon followed over the proposed constitution, and he dissolved the gathering on October 31, 1822, three months after his accession. Then he created a committee to draw up a constitution after his own views. These illegal acts were merely the worst of a number of blunders made by the upstart ruler within a few weeks. Opposition grew in the country as a whole, stimulated by members of the Masonic order, who resented the partiality shown by Iturbide for the Roman Church, and by pioneers in the movement for separation from Spain, who could not endure having one mediocre individual reap most of the advantages from independence.

Antonio López de Santa Anna, commander of the port of Vera Cruz, was ambitious as well as resentful and soon began to plan for his own rise to power. On December 5, 1822, he issued a *pronunciamiento*, or revolutionary proclamation, declaring the empire abolished and the constituent congress restored. Two months later he and some others published a statement asserting sovereignty to rest in the nation, represented by congress, and declaring definitely in favor of a republic. Iturbide now tried to save himself by conciliatory measures, and recalled congress; but he soon saw that it was too late, and abdicated on February 19, 1823. Since he offered to go into exile, congress voted him a pension of $25,000 in recognition of his aid toward independence, with the understanding that he was to reside in the Italian peninsula.

He left for Italy in May, 1823; but in July of the next year he returned to Mexico in the hope of regaining power. Congress had been notified of his designs by Masonic enemies who had been trailing him, and, without his knowledge, had declared him an outlaw. He was promptly arrested after he landed, and on July 19 he was executed. His imperial career was worse than useless to Mexico: it added to the handicap with which the country was already burdened and delayed the development of orderly government.

Nevertheless other factors, quite apart from the unfortunate Agustín I, helped to foredoom the country to a troubled career. Under the plan of Iguala the Roman Church was left in a privileged position, with a large fraction of the wealth of the country in its control. Bitterly opposed to it were the Masons, who, however, on the question as to the form of government for Mexico were split into two rival factions: *Escoceses*, the Scottish-Rite element, which desired a monarchy but had opposed Iturbide, and the recently organized *Yorkinos*, or York-Rite group, which favored a republic. Moreover, the republicans were not united; for some wished a centralized government, and others stood for federalism.

The natural division of the country into diverse geographic provinces made for sectionalism and separatism even in times of peace; and when violence was the order of the day these physiographic units formed individual recruiting grounds for rival ambitious caudillos, each aiming to march upon and capture Mexico City. Since the population was largely made up of ignorant, poverty-stricken aborigines, it was not difficult for these warrior-politicians to secure armies; hence factional warfare, governmental strife, and a rapid succession of presidents, most of them seated and ousted by revolution, have marked the history of the country during most of its national life. In the period from the downfall of Iturbide in 1823 to 1858 Mexico had, counting *ad interim* officials, forty-eight different executives, most of whom ruled as dictators.

In November, 1823, after Iturbide's exile, a new constituent congress assembled. The federalists outnumbered the centralists; and in defiance of Mexican history and experience a federal constitution was adopted, with the machinery of government closely patterned after that of the United States. In harmony with its principles the country was broken up into nineteen artificial states. Four territories also were created, and the capital was set off in a large federal district. The constitution went into effect in 1824; it provided for three balanced branches of government—legislative, executive, and judicial. The congress was to be made up of a house of deputies, with members directly elected for a two-year term on the basis of population, and a senate, with two representatives chosen for four years by the legislatures of the states. There were to be a president and a vice president, also named by the state legislatures for terms of four years, who were to be ineligible for immediate reëlection; but unfortunately—following as it did the original procedure of the United States instead of the constitutional amendment that was adopted in 1804—the Mexican supreme law decreed that the state legislatures should vote for two candidates and that the one receiving the highest number of votes should be president and the other vice president. This resulted in trouble, because the victors at times belonged to rival political factions. The judges of the higher courts were also to be chosen by the state legislatures. The Roman Catholic Church was made the church of the State, and no other religion was to be tolerated; but the Inquisition was abolished by the constitution, which also included various guaranties of personal rights.

The first president of the Mexican republic was Guadalupe Victoria, who had taken part in the revolutionary movement headed by Morelos and in the recent one under Santa Anna. Victoria was well-meaning and honest, and very popular at the outset, and is distinguished for being one of the very few Mexican executives permitted to complete the term for which he was elected. But it was a troubled four years. Unused to the degree of power given them by the national constitution, the states desired even more, and showed a disinclination to coöperate with the federal government. Financial difficulties were increased by the failure of the London bankers from whom a loan had been secured. The two political factions, headed by the Scottish Rite and Yorkist Masons, grew more bitter and hostile, partly owing to the alliance of Joel Poinsett, the first American minister to Mexico, with the Yorkists. This finally led the Mexican government to ask for Poinsett's recall. Two uprisings also took place: the first, led by a Dominican priest, aimed to restore Spanish rule; the second, which involved the vice president, was directed against the resident Spaniards, Freemasonry, and Poinsett's meddling in Mexican politics. Both the disturbances were put down without much difficulty, but they augured ill for the future.

With the second presidential election, in 1828, there began the violent methods which have since marked governmental changes in Mexico to an unusual degree. The supporters of Vicente

Guerrero, the defeated candidate, were unwilling to accept the ten-to-nine ballot of the state legislatures in favor of his rival, and appealed to congress to reverse the vote. Congress was divided on the question, and Guerrero and his followers resorted to the sword. Santa Anna, still stationed at Vera Cruz, audaciously declared Guerrero elected and proceeded to fight in his behalf. A military insurrection took place in the capital against the constitutionally elected candidate, who fled the country; and when Victoria's term ended, in January, 1829, congress installed Guerrero in his place.

In 1829 there was also trouble with Spain. In 1825 the Spanish troops had been driven out of their last Mexican stronghold, the fortress of San Juan de Ulloa, in the harbor of Vera Cruz; but in the summer of 1829, evidently encouraged by the election disorders, Ferdinand VII sent an expedition to reconquer the country. It did capture Tampico, but the pugnacious Santa Anna was equal to the situation and drove out the invaders.

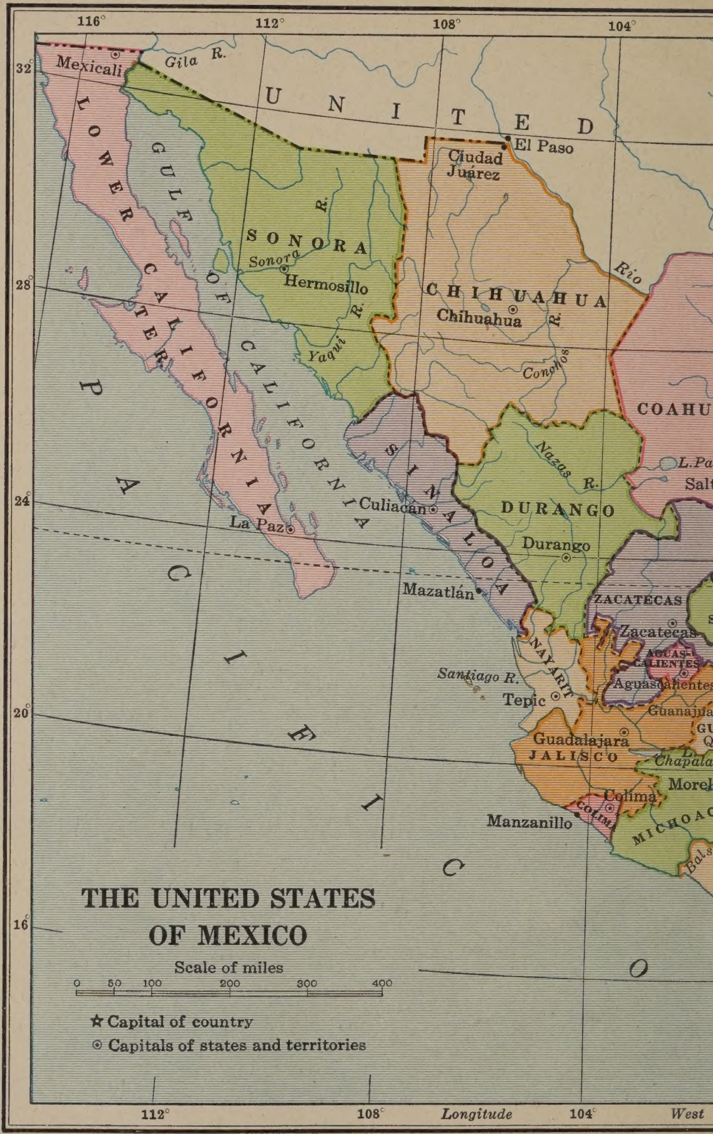
This crisis over, Santa Anna sided with Anastasio Bustamante, the vice president, in a quarrel with Guerrero, and helped to oust the latter. By February, 1830, Bustamante was in the presidential chair; but two years later Santa Anna, with crass but by no means unique hypocrisy, charged the executive with following unconstitutional methods and helped to force his resignation. Before the close of 1832 Santa Anna himself had been chosen president by the state legislatures.

Antonio López de Santa Anna has been aptly called the stormy petrel of Mexican politics. For nearly thirty years he added to the disorder and uncertainty of the country's governmental affairs. At first he helped others to power, but later gave preference to himself. A sordid opportunist quite willing to shift sides for his own advantage or amusement, he assumed and shed office with a remarkable agility. He had, moreover, a rare capacity for arranging to be on his estate, leaving his vice president to act, at times when new policies were being tried out or when congress was lacking in docility, and was thus able to escape the blame for unpopular policies, and at times could capitalize the resulting discontent.

During his first period in the presidency he followed this method. April 1, 1833, the date for assuming charge of the government, came and went; but Santa Anna did not appear in the capital, and the vice president, Valentín Gómez Farías, acted in his stead. Gómez Farías was of a different political faction from Santa Anna and held more radical principles (if Santa Anna can be said to have held any principles). Evidently honest and well-meaning, the vice president felt that many reforms were crying for enactment, and, finding the majority of congress with him, he put through numerous measures directed against the power of the army and the Church.

This action roused alarm and opposition in military and ecclesiastical quarters, and soon resulted in insurrection, which Santa Anna emerged from retirement to put down. For a time Santa Anna seemed to uphold federalism and the recent radical legislation, but in the spring of 1834 he shifted and adopted a conservative centralist policy. Accordingly he made himself dictator by dissolving the liberal congress, sweeping aside state and other local governments that opposed him, and filling the offices with men of his own choice. Yet he declared that the constitution of 1824 was still in force. When the congress that he permitted to be elected in 1834 proved to be against him, he retired to his estate, leaving another military man in charge.

The new congress was dominated by the clerico-military element; so for the first time since Iturbide's brief reign the conservative part of the population had a chance to express itself in political action. It set about trying to insure permanent advantage. Converting the congress into an assembly, these clerico-military conservatives drew up a constitution to their liking and proclaimed it in December, 1836. The new fundamental law provided for a complicated centralized government with an aristocratic basis. There were income or property qualifications for the right of suffrage and for the national officers. Evidently looking toward monarchy, the presidential term was set at eight years, with the right of reëlection. The most unique and most disastrous part of the governmental machinery was the *poder conservador* (conserving power) of five members, which



THE UNITED STATES OF MEXICO

Scale of miles
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☆ Capital of country
⊙ Capitals of states and territories
116°
112°
108°
104°
32°
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20°
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Longitude
West
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Gila R.
El Paso
Ciudad Juárez
SONORA
Sonora R.
Hermosillo
Yaqui R.
CHIHUAHUA
Chihuahua
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NAYARIT
Santiago R.
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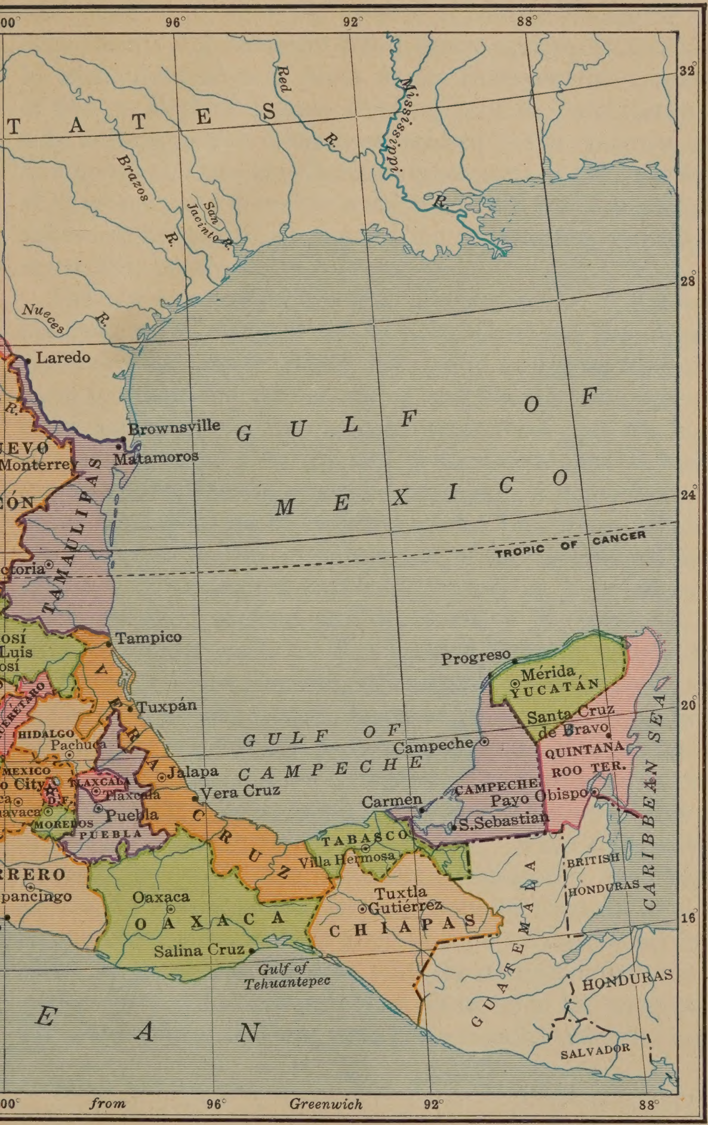
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Vera Cruz
GULF OF CAMPECHE
Progreso
Mérida
YUCATÁN
Santa Cruz de Bravo
QUINTANA ROO TER.
Campeche
CAMPECHE
Payo Obispo
Carmen
S.Sebastian
TABASCO
Villa Hermosa
BRITISH HONDURAS
CARIBBEAN SEA
RRERO
pancingo
Oaxaca
OAXACA
Salina Cruz
Gulf of Tehuantepec
Tuxtla Gutiérrez
CHIAPAS
GUATEMALA
HONDURAS
SALVADOR
E A N
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Greenwich

was aimed to preserve the balance of control among the three departments of government and to insure against dictatorial rule by such adventurers as Santa Anna. However, this committee of five, as Herbert Ingram Priestley puts it, "was responsible only to Deity, which it barely recognized." The authority given to it by the constitution placed all other parts of the government at its mercy; and the other restrictions with which the amateur statesmen hedged about most of the departments virtually insured their paralysis.

The new constitution was generally unpopular. It did not go far enough for many of the conservatives, and the clergy in particular felt that it did not sufficiently guarantee their privileged position; but the federalists and liberals were especially bitter against it. In various parts resentment over the loss of local power decreed by the new arrangement showed itself in movements for secession and independence. A number of states in the northwest, led by Sonora and San Luis Potosí, began in 1837 to plan for the establishment of a "republic of Sierra Madre." Little progress was made toward the goal, but resentment continued to burn, and discussion of the plan was kept alive for several years. In 1839 Yucatán formally seceded from the rest of Mexico and remained aloof most of the time until 1848.

The most serious trouble, however, came from Texas, which had already revolted and declared independence when the centralist constitution was put into effect. The reason for this early decisive action is to be found largely in the history of this part of the northeastern frontier of Mexico. When independence dawned, the region was virtually uninhabited; but Stephen Austin, an American frontiersman, secured from the Mexican revolutionary government a grant of land[1] on the Brazos River, which he engaged to colonize, with the understanding that the settlers were to be exempted from all taxation for seven years. The development of Texas took place rapidly under the Austin grant and other cessions, and by 1827 twelve thousand Americans had settled there, most of them Southern planters who brought their slaves with them.

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[1] In 1820 his father, Moses Austin, obtained from the Spanish authorities promise of land in Texas, but he died before the patent was issued. Then came a Mexican revolt against Spain, and Stephen Austin took up the negotiations with the Iturbide government.

About this time the Mexican government began to be disturbed over the large influx of immigrants from the aggressive and comparatively powerful republic at the north, and passed laws restricting the numbers who might come and limiting them to people of the Roman faith. These laws were not enforced, but the Americans resented them. In 1830 the Mexican government, spurred by frank disloyalty in some parts of Texas and by what British officials told them of danger from the United States, enacted a new law intended to guard against the American peril. This encouraged the settlement of Mexicans in Texas; required passports for admission of foreigners to the region; provided for the ejection of "squatters" and the cancellation of unfulfilled contracts; and, in harmony with a general emancipation decree which had been issued in 1829 as a means of weakening American immigration, prohibited the introduction of slaves. Though the new measures stirred up much indignation, perhaps an act of the same year uniting Texas with Coahuila to form a single state was more obnoxious, for it made the Mexican element politically dominant. When, in 1831, the seven-year exemption from taxation ended, disaffection among the American settlers of Texas became more bitter and general, and friction developed with Mexican authorities over smuggling to escape payment of customs duties.

Twice Stephen Austin requested separate statehood for Texas, but in vain; and the centralist measures adopted by Santa Anna in 1834 made the outlook for Texan autonomy bad. Revolt began in the section in 1835. At first the leaders of it pledged loyalty to the federal constitution of 1824 in the hope of securing support from the federalist element among the Mexicans; on March 2, 1836, however, as the hope of aid seemed vain, they declared complete independence. Santa Anna was sent with a considerable army to put down the revolt, and for a short time had the advantage; but on April 21, 1836, his forces were taken by surprise near the San Jacinto River and almost eliminated by death or capture. Santa Anna himself fell into the hands of the Texans and was their prisoner for several months, but was released late in the year.

After that very little effort was made to restore Mexican control over Texas. This was owing partly to domestic troubles caused by the centralist constitution of 1836, but also to foreign difficulties, especially over financial claims. In 1838 a French fleet bombarded Vera Cruz in an effort to secure payment of sums owed to French nationals, and Santa Anna regained some of the prestige lost at San Jacinto because his forces repelled the French in a land battle, in which he lost a leg. This brush with the French was humorously referred to as the "Pastry War," because one of the claimants for damages was a baker whose shop was looted by a mob in 1828. Through the efforts of England the difficulty was finally settled by a treaty between France and Mexico whereby the latter acknowledged the claims that had caused the trouble.

The part played by Santa Anna in the "Pastry War" and the general aversion felt for the despotic and tyrannical poder conservador gave the adventurer a chance to get back into Mexican politics. Bustamante was again in power at the time of the trouble with France. But he was finding it difficult to stay in; for repeated federalist uprisings took place, which he put down with much effort. In league with two other military chieftains, Santa Anna plunged into the struggle against Bustamante and the constitution of 1836, and by the early part of October, 1841, the trio had eliminated Bustamante, and Santa Anna had become provisional president of Mexico.

The poder conservador had already been abolished by a declaration issued by the military group. In 1843 a "junta of notables" who were responsible for Santa Anna's being in control drew up and proclaimed a constitution. It provided for a government headed by a president armed with despotic and even tyrannical powers. Under it Santa Anna was "elected" president. He took office in 1844, and soon began an orgy of waste, graft, and arrogance unequaled before in Mexican history. The very heavy taxes imposed by the new régime and the obviously self-seeking policy of the dictator and his political allies quickly roused much feeling against him, so that soon he retired to his estate, leaving another in charge. This did not save him from disaster, however; for Mariano Paredes, who had helped him to power, felt that Santa Anna had not sufficiently appreciated his services, and took up arms against him. After some weeks of skirmishing, the armies of Paredes captured the dictator-president. He was tried, and in May, 1845, was condemned to permanent exile from the country. He soon afterwards sailed for Havana. Nevertheless his game of political hide-and-seek in Mexico was by no means ended.

While Santa Anna had been riding to a new fall the relations between the United States and Mexico had become seriously strained. Some friction had long existed, owing to a variety of causes. Joel Poinsett's meddling in Mexican politics left a bad impression, and the conduct of the unscrupulous man who succeeded him helped to aggravate it. American citizens who were engaged in trade and ranching in the northern provinces of Mexico roused resentment in many sections of that country by repeatedly taking part in revolutions against the national authorities. On the other hand, when, in 1835, twenty-two Americans who had aided in an uprising in Tampico were put to death without trial by authority of Santa Anna, great indignation was expressed in the United States. Finally, in 1843 the Mexican authorities ordered the expulsion of all Americans from the northern part of the country and placed limitations on border trade with the United States.

This was partly caused by the fact that in the preceding year Commodore Jones of the American Pacific squadron had seized Monterey, California, without authority from Washington, evidently with the desire to hasten a war which he believed to be inevitable. He was forced to withdraw in considerable mortification of spirit, but the incident did much toward fanning the flames of Mexican hostility.

The war spirit that had inspired Jones's high-handed action had been chiefly provoked, however, by unpaid financial claims of Americans and by the Texas question. The claims, arising from loss of property during political disorders in Mexico, had been brought forward early in the days of Poinsett's residence in the country; but the Mexican authorities had shown a decidedly evasive attitude toward them, even though the United States had offered to arbitrate the matter. Arrangements were finally made for arbitration, and the arbitral commission, which met in 1841, allowed American claimants a total of $2,000,000. After more delay, Mexico in 1843 agreed to pay the whole sum in cash within five years, by quarterly installments; but the payments stopped after only three had been made. Mexico's conduct was in some measure due to the disturbed political conditions and the emptiness of the treasury, which Santa Anna and his henchmen had been plundering; but Mexican resentment toward American relations with Texas also made the Mexican authorities reluctant to hand over money to the United States.

The Texas question was, in fact, Mexico's major grievance, and for years it had been a growing one. Even before Texas had revolted, American desire for the territory had become apparent from the attempts of President Jackson to buy it. The efforts proved futile; but early in 1837, after the Texans had defeated and captured Santa Anna at San Jacinto, Jackson gave them the recognition of independence for which they had been urgently pressing. Almost at once Texas began to work for annexation to the United States. As is well known, because of the slavery question in the United States there was much American opposition to the incorporation of Texas, and several years passed before it was achieved. During this time the Mexican authorities, who had been offended by American recognition of Texan independence, noted with growing indignation the increasing interest in annexation displayed in Washington; and in 1844, when a treaty for adding Texas to the Union was being negotiated, they warned the American government that annexation of that territory would be regarded as a declaration of war. The treaty failed of ratification by the American Senate; but in March, 1845, Texas was annexed, through the passage of a joint congressional resolution. The Mexican government at once broke off diplomatic relations with the United States.

The boundary line between Texas and Coahuila had never been definitely fixed, and now Texas claimed to the Río Grande, whereas the Mexican authorities held that the Texan territory had never extended beyond the Nueces River. This dispute especially invited hostilities between Mexico and the United States, for the American government was determined to protect Texas in her claims.

President Polk was at first inclined to assume a conciliatory policy, however, because of the unsatisfactory status of the Oregon boundary dispute with Great Britain; he hoped by negotiation to secure a considerable portion of California, for which there was a growing desire in the United States. For a time the outlook for peaceful settlement was good in Mexico, as that country's troubled affairs were in the hands of José Joaquín Herrera, a federalist, honest and kindly although somewhat weak-willed, who had come in after the reaction against Santa Anna. Herrera did not wish war, and in reply to unofficial soundings made by Polk he let it be known that he would receive a special American representative to negotiate for the settlement of existing difficulties between the two countries. Therefore, late in 1845 Polk sent John Slidell to Mexico with instructions to work especially to secure the payment of the neglected American financial claims and the settlement of the boundary dispute.

It was hoped by the United States government that Mexican resentment over the annexation of Texas could be wiped out by a generous offer for the territory claimed by Texas on the west. It had been decided to offer in payment for this the cancellation of the American claims against Mexico; these would be paid by the United States government itself. Slidell was instructed to offer $5,000,000 in cash for New Mexico (the territory lying between Texas and California) and also to try to purchase at least the part of California including San Francisco Bay; but he was authorized to express the willingness of his government to pay $25,000,000 for the whole region between Texas and the Pacific.

Unfortunately, when Slidell arrived, Herrera's political tenure had become so weak that he refused to open conciliatory negotiations lest they be used by his enemies to precipitate his overthrow; but this did not save him, and within a month he was ousted by Paredes, who now avowed a desire for the restoration of monarchy, in which he was supported by the clergy and the army. Since Paredes was definitely hostile toward him, Slidell soon withdrew from the country.

As a matter of fact, Paredes frankly desired war with the United States, partly because of offended national pride and partly to strengthen himself politically. Moreover, he had been misled by reports of the strong opposition to the annexation of Texas which had existed in the United States, and believed that, in a war over that state, victory for Mexico would be easy because the American people would fail to give united support to their government.

Even before Paredes came into power, Polk had sent General Zachary Taylor into the disputed area with a considerable army. Early in 1846 Mexican troops were ordered to the Río Grande region. After Paredes had made it clear that he would not receive Slidell, Taylor was ordered to bring his forces up to the Río Grande. He took his station on the banks of the stream opposite the Mexican town of Matamoras, raised the national colors, and mounted a battery of field guns. The sequel to this hostile gesture came swiftly, for the Mexican commander had been instructed to attack. On April 26, 1846, a bloody conflict, apparently begun by the Mexicans, took place in the disputed territory.

By this time the Oregon question promised pacific settlement; therefore Polk, intent upon securing California, sent a message to Congress on May 11 declaring that Mexico had shed American blood upon American soil. "War exists," he wrote, "and, notwithstanding all our efforts to avoid it, exists by the act of Mexico herself." Though Senator Thomas Benton maintained that in the nineteenth century war should not be declared without full discussion, both Houses of Congress were at once strongly for war. On the day the President's message was received the House of Representatives voted that war with Mexico existed, and on the next day the Senate followed suit.

Preparations were quickly made for prosecuting hostilities; and, contrary to Mexican hopes, the American nation as a whole backed up its government. Taylor crossed the Río Grande and defeated the Mexicans in the majority of engagements between the two armies during the next few months. Before the close of 1846, American forces had occupied New Mexico and Upper California. Early in 1847 an army under General Winfield Scott was sent by way of the Gulf to capture Mexico City. By this time Santa Anna had returned from his "perpetual" exile, had won followers through expressing ardent support of federalism in opposition to the monarchist aims of Paredes, and had overthrown the latter. Just about the time that Scott's armies began bombardment of Vera Cruz, Santa Anna had himself made president, and began preparations to resist the American forces and protect the capital. Late in March, 1847, Vera Cruz fell into the hands of the invaders; Scott's armies advanced up the slopes of the plateau on which stands Mexico City, and by August, 1847, were within striking distance of it.

At this point Nicholas P. Trist, who had been sent by Polk for the purpose, opened negotiations for peace; but Santa Anna refused the terms offered, and made demands that were absurd in view of the American victories. The American armies advanced, and after fighting a number of battles in the suburbs entered Mexico City on September 13.

By this time the Mexican presidency was in the hands of Manuel de la Peña y Peña, who greatly desired peace; therefore Trist resumed negotiations, with the result that a treaty was signed at Guadalupe Hidalgo on February 2, 1848. Texas with the Río Grande boundary, New Mexico, and Upper California were ceded to the United States. In return the United States agreed to cancel the American claims against Mexico and to pay that country an additional $15,000,000. In the United States, within Congress and outside, there were some demands for the whole of Mexico; but the treaty of Guadalupe Hidalgo was ratified by the American Senate on March 10, 1848, and the war was ended.

There was a strong desire among a Mexican minority that their whole country be taken under the United States flag, for they were discouraged by more than a quarter of a century of well-nigh continuous disorder. The presence of Scott's army of occupation assured safety to life and property, and gave a consequent impetus to agriculture, industry, and commerce. The woes that would befall the nation when the American troops were withdrawn were dreaded. The Mexican element desiring annexation was much disappointed over the provisions of the treaty of peace. Promptly after the terms became known a group approached Scott and asked him to declare himself dictator of the country and maintain order by means of an army built about a nucleus of American troops. The plotters did not wish the country to remain independent, however, even with Scott as dictator, but asked him to pledge himself "to slide, if possible, the Republic of Mexico into the Republic of the United States."[1] There was abundant precedent in Mexican history for such procedure as was desired of Scott, and from the Mexican standpoint this was not a strange request; but, naturally, General Scott refused, and by the end of July, 1848, all the American troops had been withdrawn from Mexico.

For five years after the war with the United States, Mexico floundered along—a federal republic in name, but in fact a ramshackle political agglomeration marked by general anarchy. There were governmental deadlocks, repeated uprisings against both central and local authority, and frequent changes of administration. Economic demoralization continued, brigandage increased, and various parts of the country were harassed by Indian wars. Some of the leaders of the time were well-meaning and fairly able, but conditions were too much for them.

Santa Anna, for some time after losing control during the war with the United States, was an exile in New Granada, but he was scheming for return to power. The chances to do so looked favorable to him by 1853, and in April of that year he came home, thereby making the outlook for basic reform in Mexico more hopeless. He soon gained control of the government, with the support of the privileged classes (the military, the clergy,

[1] Winfield Scott, *Memoirs*, pp. 581, 582.

and the owners of vast estates), whom he promised to leave in their favored positions. He now reached new heights of vanity and presumption, indicated by his taking the title "Most Serene Highness" and, in December, 1853, proclaiming himself "perpetual dictator." In harmony with his despotic aims he dissolved congress, abolished the state legislatures, and created a large army with which to maintain himself in control; but his dictatorship proved even less "perpetual" than his banishment in 1845.

To the general resentment caused by his selfish, high-handed actions was added special indignation over his sale of the Mesilla valley to the United States government—a transaction known in United States history as the Gadsden Purchase. This arrangement grew out of a dispute over the boundary outlined in the treaty of Guadalupe Hidalgo. In this matter the Mexican dictator was rather at the mercy of American demands; but at the same time he was very anxious to have any money that the territory desired by the United States would bring, to help him on his autocratic way. The treaty of sale, as signed on December 30, 1853, provided for a compensation of $15,000,000 to Mexico; but later this sum was reduced to $10,000,000.

Perhaps because of disappointment with Santa Anna and other dictators, the privileged classes in the early fifties became more anxious to have monarchical rule in Mexico, while their opponents showed increasing determination to have a federal republic.

The Struggle over Clericalism and Monarchism

In February, 1854, the Federalists started a revolt in the department of Guerrero, headed by Juan Álvarez, a full-blooded Indian. In the plan for reform drawn up by the revolutionaries at Ayutla in March they demanded the elimination of Santa Anna and the calling of a constituent congress. The uprising spread rapidly; and the dictator, doubtless urged by the monarchist element in the population, appointed an agent to go to Europe and, at the courts of London, Paris, Vienna, or Madrid, try to secure a ruler of royal blood for Mexico. His support almost gone, Santa Anna resigned in August, 1855, and again departed for New Granada. Later he returned, but his influence in Mexican politics was at an end.

Now began a marked aboriginal participation in governmental affairs. In October, 1855, Álvarez, who was a somewhat extreme Liberal, was made temporary president; but the man destined to play a far larger part than Álvarez was the minister of justice, Benito Juárez, a full-blooded Zapotec from Oaxaca. In his youth Juárez had for a time studied for the priesthood, but he shifted to law, which he practiced with distinction in his native state, where he also served as governor with much popular approval. Honest and stable of character, he had reached the conclusion that special privilege must be abolished for the good of the land, and he spent the rest of his life working toward that end.

Now, in the Álvarez administration, he launched the reform movement by taking up the work that Gómez Farías had attempted more than twenty years before. The law issued by him in November, 1855, known as the *Ley Juárez*, struck a heavy blow by suppressing all special courts except those of the military and clergy, and to them it denied jurisdiction in purely civil cases. When word of the new measure reached the Pope, he pronounced a curse upon Juárez; but before this the clergy of the country had raised the cry "*Religión y fueros!*" (Religion and privilege!), under the pretense that religion itself had been assailed, and incited army men to attacks on the Liberals.

In the hope of somewhat allaying the storm, Álvarez agreed to hand over his office to a creole moderate, Ignacio Comonfort, the secretary of war; but the change had little effect on the feeling against the government, for the cabinet contained a number of determined Liberals who continued the campaign against the Church. A decree for the suppression of the Jesuits, who had returned to Mexico some time before, was followed in June, 1856, by the *Ley Lerdo*, initiated by Miguel Lerdo de Tejada, minister of *fomento*, or public works. This aimed to reduce the power of the Church, and at the same time to supply the humble

Mexicans with land, by prohibiting civil and religious corporations from holding real estate not directly used for purposes of worship. At the time the Church held perhaps half the Mexican soil that had passed into private control. It was not the aim of the law to confiscate this land, but to force its sale, permitting the Church a fair return. Other laws that were passed against the Church about this time took the cemeteries out of its control, limited the fees that might be charged for baptisms and marriages, and prohibited the clergy from trying to influence the action of the population in civil matters.

While these various measures to deprive the Church of its position of rather oppressive privilege were being launched, a constituent congress had been drawing up a federal constitution, which was proclaimed in February, 1857. The machinery of government provided by this fundamental law was very little different from that of the constitution of 1824; but the constitution varied much from the earlier one in that it contained many guaranties of personal liberty, specifically abolished special courts and monopolies, included the Ley Lerdo, and did not recognize a state church.

The total body of legislation, although imprudent in the sudden and sweeping character of the changes provided for, was wise and progressive in purpose. The measures touching the Church were aimed only at selfish practices and abuses; but the demoralized clergy—more concerned with material comforts, privileges, and power for the sake of selfish ends than with the faithful performance of pastoral duties—could hardly be expected to welcome the reforms; and they did not.

Before the close of 1856 they had stirred up insurrections in various parts of the country; and after the new constitution was promulgated the archbishop of Mexico denounced it officially and announced that persons who had taken the oath to support it must not take the Sacrament until they had retracted. This dismayed public officials, from whom the oath was required.

Unfortunately for the reform party, Comonfort, who lacked both political convictions and moral courage, was elected the first president under the new order. His wavering attitude came out in his first address to congress, in which he advocated amendments to the constitution. What he really wanted to secure through this was more power for himself as chief executive; but the Church party took his recommendations as a hint of concessions to them. Hence on December 17, 1857, Zuloaga, a clerical tool and the head of the national army, issued a "plan" in which he denounced congress and the constitution, but favored Comonfort as supreme head. This led congress to repudiate the president, who, since he had no desire to join the clerical faction, was thus left politically stranded. His support gone, he resigned late in January, 1858, and fled to the United States.

Now came what was later known as the War of the Reform. The clerical Conservatives promptly got control of Mexico City, and put in Zuloaga as president. He quickly swept aside the changes made by the Federalist Liberals; but he was not long in office, for frequent changes in leadership took place on the reactionary side during the struggle. Benito Juárez, on the other hand, became and remained the leader of the reform element throughout the struggle. In his hands, as Carlos Pereyra puts it, the constitution of 1857 was for ten years a banner, which he fought to support and defend; and in the name of the reforms for which it stood he rallied his troops. As a whole, the northwest and much of the coast were for Juárez; but as the fortunes of war shifted he moved his capital from place to place until May, 1858, when he established himself at Vera Cruz, which remained his seat of government until the end of the war. From Vera Cruz in 1859, in an effort to weaken the support of the opposition, he issued a number of decrees against the Church. These abolished the monastic orders, declared marriage a civil contract, called for the civil registration of births, marriages, and deaths, made payments to the Church optional, specifically granted religious toleration, and nationalized all Church property not used for religious purposes.

The war was an unusually brutal and bloody one and was fought with great intensity on both sides. To the Federalists it was a struggle for the liberties and principles laid down in the new constitution; to the opposition it became, under the stimulus of the clergy, a holy crusade fought to save religion. During the first two years it appeared to be a draw; but in 1860 the Federalists began to gain, and continued to do so as the year advanced. On December 27 Juárez led his victorious armies into Mexico City. Shortly afterwards he expelled from the country the archbishop of Mexico, some lesser Church officials, and the Spanish minister, who had frankly aided the Conservatives during the war. He also quickly put into effect the anticlerical decrees issued at Vera Cruz by seizing extensive tracts of Church lands near the capital and taking over valuable buildings belonging to the monastic orders.

In June, 1861, Juárez became president of Mexico under the federal constitution; but he was not free to launch the progressive economic and educational program he had planned, for he was at once beset with troubles caused by foreign creditors. The need for money to suppress guerrilla fighting had led him to suspend for two years the payment of interest on debts owed abroad—a desperate but unwise recourse. One of the first results of it was a treaty made in London in October, 1861, between the principal creditors—France, Spain, and England—whereby they agreed to occupy the ports of Mexico and collect the customs duties to secure payment of debts; but they agreed that there was to be no violation of Mexico's territorial integrity or of its political autonomy.

By the early part of 1862 the three interested nations had landed armies in Mexico; and it soon became evident that Napoleon III had guilty designs upon the war-worn country. More than a year before this he had decided to place a royal puppet upon a throne in Mexico to serve French commercial and political interests. In order to secure an excuse for marching on Mexico City, his representative in Mexico demanded the payment of certain dishonest financial claims and made false charges against Juárez's government. Realizing the scheme of the French emperor, the Spanish representative connected with the intervention soon withdrew from Mexico, and the English agent left somewhat later. By the summer of 1863 the French forces had occupied Mexico City. To their standards the Mexican Monarchists rallied, and Juárez withdrew his armies to San Luis Potosí.

As a matter of fact, the Spanish government had been as guilty in designs against Mexico as was Napoleon III, and had really proposed to the latter that a European sovereign be set up in that country. But when Don Juan, the Spanish pretender, had refused the throne of the Moctezumas, the French emperor had decided to carry out the idea in his own interests; hence he had plotted with a group of Mexican Monarchists at the time in Paris, including José María Gutiérrez de Estrada, the agent commissioned by Santa Anna to find a European prince to rule over Mexico. In 1861 the dreaming, irresolute Archduke Ferdinand Maximilian, brother of Francis Joseph of Austria, was approached by Gutiérrez and offered a throne in Mexico. Maximilian, who was then living quietly at Trieste, was interested in the promised adventure, and on April 10, 1864, after the monarch-hunting committee had thoroughly convinced him that the great majority of the Mexican people wanted him as their ruler, he formally accepted imperial control. He and his ambitious and energetic wife Charlotte, daughter of Leopold I of Belgium, known to history by her Spanish name Carlota, reached their demoralized, war-torn dominions late in May, 1864.

Maximilian's rule began under the protection of a considerable French army. By agreement this was to remain for a limited time, at the end of which it was assumed that the emperor would have adequate national forces. The new ruler's policy, however, quickly reduced the small Mexican support he had at the outset. His plans were too progressive for many of the Monarchist leaders of the country; he cooled clerical ardor by refusing to restore the Church lands, which had passed into private control; and his conciliatory attitude toward the republican Federalists failed to win them, and it offended many of his original supporters.

Meanwhile Benito Juárez, moving his capital from place to place, kept up a stubborn resistance in the name of the constitution of 1857. He had the recognition and moral support of the

American government and the physical aid of many a private shipment of firearms from the United States. When the Civil War ended in that country, veterans of the Union armies crossed over into Mexico and became volunteers in the forces of Juárez. The authorities at Washington, while still embarrassed with the Civil War, had given France a number of mild warnings concerning her occupation of Mexico. When the American conflict had ended and the Confederate States (on the success of which Napoleon III had counted) no longer existed even in theory, sterner tones were resorted to. On December 16, 1865, Secretary of State Seward addressed to the French government what was virtually a threat of war unless its troops were withdrawn from Mexico. Somewhat later he expressed hostile disapproval of a plan to displace French forces in Mexico by Austrian ones. Napoleon III, partly because of the American attitude and partly because of ambitious designs in Europe, decided to withdraw his army from Mexico before the time limit set by the treaty had expired.

Maximilian learned of this determination with much dismay, and was inclined to abdicate at once; but he was overpersuaded by others, particularly by Carlota, who liked the pomp and ceremony connected with imperial rank and vastly preferred the stirring life in Mexico to the dull existence in Italy from which she had escaped. She therefore undertook to go to Europe and plead with Napoleon for continued support—a futile errand. Maximilian meanwhile stayed on, trying vainly to resist with his reduced forces the advance of Juárez. By May, 1867, his remnant of an army was starving, and on the fifteenth of the month he surrendered at Querétaro. Trial and condemnation by court-martial followed, and on June 19 he was executed by a firing squad, his final prayer being that the shedding of his blood might regenerate unhappy Mexico.[1]

With the overthrow of Maximilian and of the Second Empire came the end of the strong yearning for monarchic rule that had persisted in Mexico since the days of Iturbide; for during the long, devastating war ending in 1867 national self-consciousness, which had before this been generally lacking, grew rapidly, and the great majority of the population came to look on Monarchists and reactionaries as traitors to the country and to identify federalistic and liberal principles with patriotism.

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[1] The empress, who became hopelessly insane when she found herself unable to get help for Maximilian, survived him for nearly sixty years.

In the autumn of 1867 local and national elections took place, and Juárez was chosen president, though two other leaders in the recent war, Porfirio Díaz and Sebastián Lerdo de Tejada, brother of Miguel, showed considerable political strength. In his first address to congress Juárez expressed deep appreciation of the moral support given to him by the United States during the recent struggle. That country was by no means unique in standing by Juárez, but it was one of the strongest nations that did so. Various European powers had recognized Maximilian's government; but gradually diplomatic relations with these were restored, and an effort was made to get the nation down to a new basis of peace abroad and peace at home.

In the interest of the latter especially, as well as to improve the finances, Juárez cut down the army to a third of its war strength. Unfortunately, trouble came from the discharged officers and men, who were easily appealed to by discontented Liberals. These disaffected ones induced various states to defy the central authorities. Revolts were frequent, and Juárez's measures to restore order caused him to be suspected of aiming at selfish dictatorial power. In consequence of this attitude he was advised by some of his best friends not to seek reëlection; nevertheless, feeling that his work as guardian and executor of the constitution was not completed, he became candidate in opposition to Díaz and Lerdo de Tejada, whose ambitions had grown since the last election. None of the three received a majority vote in the popular election provided by the constitution of 1857, and the decision was left to congress, which named Juárez as president. Doubtless the popular election, as was customary, was marked with fraud, particularly in behalf of Juárez. The Díaz leaders, however, rather implied that this was something new, and they revolted, charging corruption in the vote and promising to bring about a reform.

Juárez set about crushing the new uprising. He had the situation fairly well in hand when, on July 18, 1872, he died from an illness with which he had for some time been afflicted.

As provided by the constitution, the chief justice of the supreme court, who happened to be Sebastián Lerdo de Tejada, became provisional president. Less able and less popular than Juárez, Lerdo inherited all Juárez's troubles, including the Díaz rebellion, which, however, he managed to end; and in the special election held in October, 1872, he won the presidency against Díaz. Though his unpopularity increased, Lerdo aimed to be reëlected. This led Díaz to start a new revolt in the name of constitutional government and free elections—a political platform of special interest in view of his later dictatorial methods. The struggle was very brief: in November, 1876, the forces of Díaz entered Mexico City and Lerdo fled to the United States. The usual elections followed, and in May, 1877, Díaz was proclaimed constitutional president of the country. With him came a new era.

The achievements of the Díaz régime can best be measured by first considering what had been accomplished along nonpolitical lines in the half-century of independence that preceded his accession to power. During this period, when war was intermittent and revolution habitual, brigandage was chronic; and under all three of these evils life and property suffered, and economic activities were discouraged. The mining of gold and silver continued, however, as in colonial days, virtually the same methods being used; copper and some of the other baser metals also were extracted on a small scale. The exploitation of forest products occupied the attention of many. Stock-raising remained important, but almost nothing had been done to improve breeds. To the agricultural crops of the Spanish period, coffee was added early in the nineteenth century, and it had come to surpass in value many of the older products. There had been a notable growth in manufacturing since independence, but the products, on the whole, followed traditional lines. One of the most important of these was cotton cloth, for the manufacture of which there were reported to be more than seventy factories in the country in 1876; but the material was coarse and was used chiefly for the clothing of the lower classes. By 1876 the trade of the country had expanded to include several of the other Latin-American countries, the United States, and the nations of western Europe. The estimated value of imports, which consisted largely of manufactures, especially hardware and the finer textiles, was about 29,000,000 pesos, or Mexican dollars.[1] More than a third of the goods purchased came from England. Exports totaled about 32,000,000 pesos and included hides and skins, henequen and related fibers and cordage, timber, dyewoods, coffee, minerals, and gold and silver coins. These coins, which amounted to three quarters of the whole value of exports, were used by various nations for trade with China.

One of the most serious obstacles to economic development was the lack of modern transportation facilities. The vehicular roads of colonial days were very badly worn, for scant attention had been given to repairs. Little had been done toward railway-building. Though interest was early shown in uniting Vera Cruz with the capital by rail, and though a concession for that purpose was signed in 1837, nothing was accomplished at the time. It was not until 1850 that the first railroad, connecting Vera Cruz with Molino, thirteen kilometers distant on the way to Mexico City, was opened in the country. Building went slowly, for surmounting the rugged Sierra Madre Oriental was an expensive and most difficult engineering feat; but by the close of 1872 the long-projected line was completed, and on New Year's Day, 1873, President Sebastián Lerdo de Tejada marked the event by descending by train from the capital to the Gulf port. When Díaz came into power this was the only railroad in the vast, rugged country.

The greatest change to take place in Mexico in the fifty years after independence from Spain was the change that befell the Roman Church. At first protected in its wealth, privilege, and religious monopoly, it came to be shorn of its riches, to be made dependent upon voluntary gifts for support, to be stripped of extraordinary power, and to be placed in competition with other ecclesiastical organizations. The seeds of Protestantism appear to have first entered the country with the American armies in 1846 and 1847 through chaplains and agents of Bible societies who accompanied the troops; but it was not until the overthrow of Maximilian that serious missionary work began. Then some of the Protestant leaders from the United States acquired from the government certain church buildings it had taken from the Catholics, and Juárez and his family encouraged the newcomers by attending Protestant services. As was to be expected, the feeling of the Roman clergy against the missionaries was intense; and a number of these were killed in spite of the efforts of the government to give them the promised protection.

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[1] The Mexican dollar was worth approximately fifty cents in United States money.

Very little, relatively speaking, had been done for education, which was almost completely in the hands of the Roman clergy until after the War of the Reform. In the ten years of comparative order that followed the death of Maximilian, lack of money made it difficult to modernize or expand instruction; but from 1870 to 1876 the number of primary schools was increased from 5000 to 8103. Most of these were supported at municipal expense; but a few had aid from state funds, and a small number were private institutions under secular or Roman Catholic control. The enrollment in these schools in 1876 was three hundred and fifty thousand, most of the pupils being boys. Of secondary schools, public and private, there were about forty, and a somewhat larger number of professional institutions existed; these gave training in law, medicine, and engineering. The country also had a school for deaf-mutes and another for the blind, two academies of fine arts, and two conservatories of music. There were perhaps twenty public libraries of a sort, of which the National Library, housed in the great church building of the Augustinian friars after the abolition of the orders, was by far the most important; for to it had gone many valuable collections of books from the monasteries. The galleries of the San Carlos Academy of Fine Arts, too, were much the richer for rare paintings that had once graced the walls of the religious houses. Four or five of the largest cities had museums of natural history or of antiquities, but the only one having notable collections was the National Museum in the capital.

At the opening of the Díaz régime the population of Mexico was estimated at 9,500,000,—figures which, compared with the school enrollment, give some idea of how great must have been the illiteracy. Since there had been but little white immigration, the nation remained largely aboriginal. There had been considerable shifting of wealth and social standing. Many of the moneyed group of Iturbide's day had lost in the lottery of politics; and the winners—creoles, mestizos, and a few Indians—formed a class of newly rich. Many private fortunes had been gained and others increased by the acquisition of Church lands after the passing of the Ley Lerdo in 1856; for, contrary to the hopes of the Juarist reformers, the ignorant and humble were so fearful of the wrath of the clergy that they made no effort to acquire the little farms they needed, and the clerical estates were bought by the wealthy, usually those already possessing lands. The same law had miscarried in regard to the communal tracts of the Indian villages, which it forced upon the market. It is true that when the sales came, the aborigines acquired individual title to fractional portions of the lands; but owners of large neighboring estates soon deceived or coerced many of them into parting with these, their only certain means of acquiring a living. A considerable fraction of the villages clung to their communal holdings in spite of the law.

Owing to the failure of the agrarian laws to achieve their ends, when Lerdo went out of office the poor and humble of Mexico—who formed the vast majority of the population—were becoming yet more wretched and lowly. Unfree peonage existed, the number of laborers attached to estates through debt to the owners was growing, and most of the free natives who had been brought under European influence eked out a miserable existence. Referring to this class, an English missionary of the period wrote:

> These Indians supply the towns with poultry, vegetables, pottery, eggs, mats and other similar corn materials, which they carry for many leagues. For instance, an Indian starts from his home loaded with goods weighing, on

> an average, five arrobas (one hundred and twenty-five pounds), and sometimes eight arrobas, and will travel a week, and often two or three weeks, before disposing of his wares. He calculates how many days the journey will last, and takes a stock of tortillas to last the whole time, allowing six tortillas a day. . . . And this is his only subsistence. . . . Charcoal, plants, etc. are supplied to the towns by the Indians, and it is astonishing to see their patient endurance. A man will spend, at least, four days in the mountains burning the charcoal; then carries it on his back a day's journey, sometimes more, and sells it for thirty-seven cents, thus realizing from six to seven cents a day. In the same way the poor creature fares with all else.[1]

In addition to these broken-spirited Indians there were some wild tribes that had never really felt the yoke of Moctezuma or of Spain, notably the Apaches and Comanches of the northern part of the country.

THE DÍAZ RÉGIME

Porfirio Díaz, like Juárez, was a native of the state of Oaxaca, in the capital of which he was born in 1830, of Spanish and Mixteca Indian blood. His father, a small-scale maguey-grower and innkeeper, died when the son who later became president of Mexico was but three years old. His mother was anxious to have Porfirio become a priest; and he was sent to a seminary to prepare to take orders, working at odd jobs of carpentering to help toward supporting himself while he studied. But, again like Juárez, he shifted before long from theology to law, to the grief of his mother and the wrath of his godfather, a canon of Oaxaca. This willful decision brought him under the direct influence of Benito Juárez, against whom he turned thirty years later; for he attended lectures on law given by Juárez, at the time professor in the Institute of Oaxaca. Soon after finishing his legal studies Díaz plunged into politics in the national mode —through revolution, fighting with the Liberals against Santa Anna. Later he served with some distinction in the War of the Reform and against the French and Maximilian. He was vain and ambitious, but had much energy and forcefulness, a realization of the material needs of the country, and the ability to put his ideas into effect on a large scale.

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[1] Gilbert Haven, *Our Next-Door Neighbor: a Winter in Mexico*, appendix, p. 462.

Politically, however, he was retrogressive: and although he fought under Juárez against Santa Anna, he was closer akin to the latter in methods of government than to the former. He checked political development by restoring the military dictatorship. His first term of four years was fairly constitutional in a superficial way; and he yielded authority to Manuel González, whose election he arranged for, since the constitution had been amended to prohibit the immediate reëlection of the president. Subsequently, as his ambition and vanity increased, he had the constitution amended again in order to succeed himself indefinitely and hence was able to remain continuously in office from 1884 to 1911. The elections were farcical—probably more so than those of Juárez's day against which Díaz revolted; and yet, as Professor Priestley remarks, the dictator's power was "resting on the known consent of the governed." That is, if there had been really free and popular elections during this period of twenty-seven years, the choice would have fallen to "Don Porfirio"; for he gave the peace and order that all really desired, and he bought the support of the upper classes by privileges and favors of various sorts.

Though the peace that made material progress possible was Díaz's basic contribution, the way was fairly well prepared for it when he came into power; for monarchism was dead, the Church party was crushed, and the nation as a whole was weary of war. Díaz brought to the masses of the country a new respect for law and order, however, and made life and property safer in Mexico than almost anywhere else in the world. Brigandage, which had been a problem in colonial times and had returned under turbulent independence, was stamped out by means of the *guardias rurales*, a very efficient body of rural mounted police, including many a one-time "knight of the road" who found it more profitable to serve Don Porfirio than to attempt to follow his earlier calling under the dictator's iron rule.

Graft and corruption, rampant when Díaz came into office, were greatly reduced, partly through turning off hundreds of needless government "employees"; and though a good deal of public wealth was given to get and keep political friends, this period was doubtless, on the whole, more honest than the turbulent half-century that preceded it.

Under the new régime foreign relations improved, largely through the adjustment of outstanding financial claims and prompt payment of international obligations when they fell due. For a time there was friction with the United States over Indian raids into United States territory; but after terms were reached, friendly relations were permanently established. The coöperation of Presidents Díaz and Roosevelt in an attempt to solve Central American problems has already been mentioned. This cordiality was partly due to the fact that the Mexican president encouraged American capitalists to invest in his country by offering them liberal terms.

Through alien wealth (mainly from the United States and England) came the great material development marking the Díaz rule. Foreigners acquired large tracts of agricultural lands which, worked scientifically, yielded much more abundantly than by the former primitive methods. Modern machinery was also the means of working the ancient Mexican mines more profitably, and it was used by the capitalistic invaders of the land to tap the great petroleum wealth of the country.

Partly through the activities of these foreign investors a great stimulus was given to Mexican commerce; but much was also accomplished through the efforts of José Ives Limantour, for many years Díaz's secretary of the treasury. Limantour abolished the alcabala and brought about other revolutionary changes in the financial system of the country. By 1908 the value of exports from Mexico increased to 500,000,000 pesos, as against 32,000,000 in 1876. One of the most important items was petroleum, the production of which grew from somewhat over two hundred thousand barrels in 1904 to three hundred million barrels in 1910.

Capital from the outside was largely depended upon for the much-needed railroads, which began to be laid shortly after Díaz took control. During his first term two important lines were begun: one connecting Guaymas, in northern Mexico, with the United States, and the other, the Mexican Central, running from the capital to El Paso del Norte. In both cases the railroad companies were given some government aid, on the basis of the mileage constructed. During the administration of González, who carried out many of Díaz's policies, the two lines were completed, and related enterprises were carried on, such as harbor improvements, bridge-building, and the extension of telegraphic communication. When Díaz took permanent control after González's term, new railroad lines were contracted for and begun; and the building went on year after year until by 1911 (when the Díaz rule ended) there were 24,717 kilometers, or about 16,000 miles, of rail lines in the country, as against 691 kilometers in 1876. The lines connected most of the state capitals and five of the chief ports with Mexico City.

Originally most of the roads were owned by foreigners, especially Americans; but toward the end of his régime Díaz, to guard against the loss of Mexican economic independence, borrowed a huge sum and bought many of the lines from their owners, procured a controlling interest in the rest, and formed the whole into a national system.

These various changes made the Mexican government prosperous. Under Díaz, treasury surpluses took the place of the familiar deficits. Mexico's credit was good. This was true even in the last years of the nineteenth century, when the rapid depreciation in the price of silver hurt the country greatly because silver coins formed the standard of the currency and silver pesos still played a considerable part among the exports. For a time the rate of exchange threatened to become ruinous for Mexico; but the crisis was passed without serious handicaps through the wisdom of Limantour, who stopped the minting of silver by private concerns licensed by the state and in 1902 placed the country on a gold standard.

The possession of the necessary funds made it possible for the Díaz government to carry out a long-existing project for the drainage of the Valley of Mexico. The lack of an exit for surplus water from the heavy rains and melting snows rendered the capital subject to occasional destructive floods, and inadequate drainage caused the annual death rate to be exceedingly high. During the colonial period the Spanish government had tried to solve the difficulty, but had met with little success; therefore in 1856, when Comonfort was president, a new plan was adopted for drawing off the excess water, and under Maximilian its execution was begun. Because of lack of funds, however, the work went on slowly and intermittently until 1883, when the plans were improved and enlarged and the task was pushed through and completed in 1903. The new drainage system, composed of a canal twenty-two miles long and a tunnel exceeding six miles, was connected with a river which reached the Gulf of Mexico near Tampico. The enterprise proved a success; but unfortunately, after the subsurface water had been drained off, the foundations of Mexico City settled unevenly, throwing out of plumb many of the fine old colonial buildings.

The construction of a somewhat adequate system of railroads and the carrying out of the plan to make Mexico City safe and sanitary by draining the valley in which it stands were perhaps the greatest and most permanent works of Díaz. Many of his other activities, though resulting in achievements which impressed foreign nations, were bad for Mexico in the long run, since they helped to restore old problems or created new ones; in other words, the foundations laid by Díaz would not serve for the building of an enlightened, republican Mexico and hence had to be torn out and cast aside so that sound bases could be put in.

During the Díaz régime it came to be said that Mexico was "the mother of the foreigner and the stepmother of the Mexican," and there was reason for the statement. With equal truth the dictator's critics might have charged his Mexico with being an indulgent mother to the small group forming the upper classes and a cruel stepmother to the great rank and file of the nation. This attitude was especially clear in his land policy. Díaz's liberal concessions of Mexican soil to foreigners have already been referred to. Since the country lacked capital for developing its resources, the dictator probably did well to seek aid from abroad; but in securing it he was prodigal of the nation's heritage of mineral wealth. Under the old Spanish law subsoil and surface soil were separated: the purchase of land for agriculture did not give title to the minerals beneath. Díaz changed this in 1884 by legislation giving ownership of the subsoil with the surface title. The result was to place a large part of Mexico's great mineral wealth in the hands of a few moneyed men (mostly foreigners, among whom Americans and English were preponderant) without adequate returns.

Perhaps equally bad for the nation as a whole were a number of laws giving one third of all unsurveyed lands to those who would survey them, with the result that twenty-nine individuals or companies acquired about forty million acres in return for surveying. In addition they purchased at very low rates much of the remaining two thirds surveyed. At the time when the survey laws went into effect many Indian villages were still clinging to their *ejidos*, or communal lands; and there were also a great number of small private holdings, or *ranchos*, in the hands of aborigines or mestizos. Though most lands of both types had probably been owned by tribes or families for several generations, as a rule the occupants had no documentary evidence of ownership. Consequently a law of 1886 requiring that all landholders prove title was disastrous to these humble, unsophisticated people. Individuals, villages, and tribes lost to the government the lands needed for their sustenance merely because they could not present deeds of ownership. For the most part the domain thus recovered by the government quickly passed into the hands of foreigners or of the dictator's wealthy favorites. These unwise and unjust laws resulted by 1910 in the incorporation of most of the soil of rural Mexico into about eight thousand private holdings, some of which were princely in extent. The largest was owned by Luis Terrazas, the unscrupulous governor of the state of Chihuahua, who by the close of the Díaz régime had, as Professor E. A. Ross puts it, "bought and filched and grabbed and wheedled" together six million acres—a domain equal in area to the republic of Costa Rica.

The loss of their lands usually forced the aborigines to hire themselves out on the haciendas, where they frequently worked on soil that was once their own. Their helplessness and ignorance and the unscrupulousness of many of the hacendados often caused many of them to sink into debt slavery. A progressive modern nation could not be built upon such conditions.

Furthermore, Díaz helped to restore the Church to a rather menacing degree of its former power by gradually making concessions to it. When he first came into control, the War of the Reform was so recent that in the interest of his own tenure he enforced the laws that had been passed against the Church; but as time passed and he felt his position secure, he permitted various laws against the clergy to become dead letters, partly as a result of his wife's influence. This tended to restore the bigotry of the Church and to increase its ambition and aggressiveness.

Though Díaz controlled the destinies of Mexico for a generation, he did comparatively little toward preparing the nation for constitutional republican rule by giving it the elements of book-learning. He did introduce normal schools and extend the public-school system considerably, but nothing adequate was done—or even attempted—to make the population really literate and to wipe out the dense ignorance which was an obstacle to the development of self-government. That more funds for educational work were available than were used is apparent from the fact that scores of millions of dollars were spent in beautifying the capital and in the erection there of public buildings far less needed than the thousands of country schoolhouses which could have been built for the money.

Don Porfirio's failure to do his utmost to wipe out illiteracy was probably not so much due to personal disinclination as to the influence of the clergy and the great landholders, whom he was unwilling to offend. The former wished the masses kept ignorant, in the interest of holding them loyal to the Church through inspiring superstitious fear; the latter were intent upon keeping them helpless in order to have a permanent supply of cheap labor. But it is probable that toward the middle of his régime Díaz was strong enough to have safely defied opposition in this regard. Had he done so, and had he allowed the states and municipalities a fair degree of self-government through permitting literates to vote freely, it is probable that Mexico would have been spared the revolutionary period that followed his overthrow.

Díaz's vanity made him want to be the one bright star of the Mexican political sky, and therefore he jealously resented and punished the activities of others, especially state officials, who threatened to become counter-attractions. As age came upon him, however, he was forced to defer more and more to his able advisers, and since he was no longer so conspicuously dominant in the nation his popularity began to wane. Nevertheless, as late as 1904, when he was seventy-four years of age, he was still strong enough to defy his advisers and secure such amendments to the constitution as extended the presidential term to six years and made specific provision for the election of a vice president. Apparently his aim was to retain direct control of Mexico as long as possible through lengthening the term of office, and then to turn over his power, as fully as conditions demanded, to a vice president of his own selection.

In the election of 1904 his candidate for the newly created office was Ramón Corral, a man of little ability and few supporters; yet, by the usual farcical methods, he and Díaz were chosen for the six-year term. Feeling against the dictator's plan of succession and his continuance in power grew in many quarters. The Masonic lodges, the recently developed Socialist group, and various ambitious individuals began to work energetically against him.

Two events of 1908 did much toward paving the way to a strong uprising for his overthrow. The first one was an interview between Díaz and James Creelman, published by the latter in the March number of *Pearson's Magazine*. Evidently with the object of conciliating his opponents, the dictator told Creelman that Mexico was now ready for democratic government and that he would welcome an opposition party and would turn over his power to its candidate if the latter were legally elected. The announcement at once stirred great hopes among Díaz's opponents and fired Francisco Madero, a member of a rich and influential family of northern Mexico, with a desire to be the legally elected rival candidate. Before the close of the year, capitalizing the excitement Díaz's move had created, he published a book entitled *La Sucesión presidencial en 1910.* This work mildly but insistently criticized the Díaz régime and demanded free elections in 1910.

THE TWENTIETH-CENTURY REVOLUTIONARY ERA

Madero became the candidate of the anti-reëlectionists and the center of a revolutionary plot. His arrest and imprisonment by Díaz followed; and in July, 1910, while he was in prison, Díaz and Corral were reëlected for another six-year term. Unquestionably Díaz was still desired by the majority of the clergy and by the rich and conservative lay element, including foreign capitalists. But here and there among the favored upper stratum (owing to altruism as well as to selfishness) there was much dissatisfaction, and of the landless laborers who wistfully looked for better times there may well have been millions.

Shortly after the election Madero was released; and on October 5, 1910, he issued a call to revolt known as the plan of San Luis Potosí. The plan demanded Díaz's resignation, electoral reforms, and the redistribution of lands. By prearrangement, revolts broke out in various parts of the country the next month. In an effort to save his position the dictator, through Limantour, began reforms in the governmental organization. This was futile, for the revolutionary spirit spread. On May 9, 1911, Madero's army captured Ciudad Juárez on the northern border. Unrest displayed itself everywhere, and rioting took place in Mexico City. Broken in health, the old dictator reluctantly laid down his power on May 25, 1911, as did Ramón Corral on the same date. Shortly afterwards Díaz departed for Paris, where he died on July 2, 1915.

By agreement with the revolutionaries, a member of Díaz's cabinet took charge as provisional president, but in November Madero was elected chief executive. This choice, though logical and perhaps inevitable, was very unfortunate, for the new president was a mere well-intentioned dreamer, weak-willed and politically inexperienced, and afflicted with a large following of greedy relatives who promptly became unpleasantly conspicuous in government circles. The duties confronting Madero were quite beyond his powers; and during the slightly more than a year that he was in office the country drifted. When it appeared that he had no idea of how to set about the distribution of lands which he had promised, Emiliano Zapata headed a movement that resulted in the seizure and division of the large sugar haciendas of the state of Morelos. In the north were other revolutionaries directly working for the downfall of the president. Not only was Madero unable to restore law and order to the troubled country and to keep his promise for reform, but he could not even protect the public funds, to which his followers, including many of his relatives, shamelessly helped themselves.

The difficulties culminated on February 9, 1913, with the mutiny of several garrisons in the capital and the release of two rebels against Madero's authority. Then followed ten days of terrible slaughter in the streets of the city. Before it ended, Victoriano Huerta, commander of the federal forces, moved by ambition, turned against the government and on February 18 arrested and imprisoned Madero and the vice president, José Pino Suárez. Since Madero was not sufficiently clear-headed to see his danger, he delayed writing out his resignation. His attitude caused Huerta to suspect a counter-plot; therefore, though he had promised the prisoners safe conduct to Vera Cruz, he apparently decided to take no risks by leaving them at large. In any case, on the night of February 22 Madero and Pino Suárez were both assassinated when they were being taken from the national palace to the penitentiary in Mexico City. Though Huerta at once denied all responsibility, many felt that the crime was committed at his orders; and it was generally agreed that he was morally accountable for what had taken place, for he had already had himself made president *ad interim*.

The outcome of Huerta's seizure of power was largely determined by the attitude of foreign governments. Many of them recognized him rather promptly. During the ten days of fighting in Mexico City the American ambassador and dean of the diplomatic corps in Mexico, Henry Lane Wilson, had shown rather unseemly zeal in urging Madero to resign and in backing Huerta, whose recognition by the United States government he strongly pressed. Through his implication in the deaths of Madero and Pino Suárez, however, Huerta lost all chance of recognition by the administration at Washington; indeed, President Woodrow Wilson not only withheld recognition but tried, though in vain, to induce Huerta not to be a candidate in the coming election. Before the election took place Huerta gave a hint of what might be expected of him later by arresting more than a hundred members of congress and assuming dictatorial powers. Nevertheless, by means of an unusual amount of manipulation he won the election, which took place in October, 1913.

President Wilson's persistent refusal to recognize Huerta and the frank hostility later displayed by the Washington authorities toward him insured a very brief career for the new dictator. Even without this hostility it was unlikely that his policy would long survive popular resentment, for the discussions that had been taking place since 1908 had been sowing the seeds of new and more democratic ideas. In fact, besides inspiring new resistance he inherited some of the movements against Madero that had been under way outside the capital. His most formidable domestic foe was Venustiano Carranza, governor of Coahuila, who had been a supporter of Madero. Carranza at once refused to recognize the usurping dictator and called upon the governors of other states to rally to the "constitutionalist" cause. Resistance spread quickly to other northern states, one of the most active being Chihuahua, where Francisco Villa became prominent for his revolutionary activities.

The loss of American lives and property in the conflict against Huerta led to clamor on the part of American investors in Mexico for intervention by the United States; but President Wilson adopted and for many months maintained a policy of "watchful waiting," believing that Huerta could not long hold out, since without American recognition it would be impossible for him to secure the absolutely necessary foreign loans. In February, 1914, however, Wilson decided to accelerate matters somewhat by enabling the rebels to get war supplies from across the border and therefore lifted the embargo which two years before had been placed upon the exportation of such supplies to Mexico.

The new move had not been given time to show results when, on April 9, 1914, the policy of watchful waiting was brought abruptly to an end by what was later known as the "Tampico incident." A Huerta official at that port arrested and imprisoned a boatful of marines from the United States vessel *Dolphin* who, for the purpose of buying gasoline, had landed in a zone of Tampico which was at the time under martial law. Admiral Mayo of the Gulf fleet at once demanded of the officer in charge at Tampico that the men be released, with an apology for their arrest, and that a salute of twenty-one guns be offered to the American flag. President Wilson, apparently feeling that Huerta would strengthen his hold on his office if he were permitted to seem to defy the United States, backed up Mayo's demands.

The prisoners were promptly released and an apology was made; but Huerta, who declared that the Wilson government intended to "get" him in any case, refused the salute. President Wilson therefore asked authority of Congress to use force to get satisfaction from the Mexican dictator, but before that body had responded he took the war-making powers into his own hands by ordering the seizure of Vera Cruz.[1] This was done on April 21, with a loss of eighteen marines and about sixty Mexicans.

The outlook was dark, and for a time it seemed that general war would take place between Mexico and the United States and that thousands of lives of peaceful people would be sacrificed because Victoriano Huerta would not salute the United States flag as Admiral Mayo and President Wilson had decided that he should; but, thanks to an offer of mediation made by Argentina, Brazil, and Chile through their representatives in Washington, the United States government was able to recede

[1] This unconstitutional action was caused by the fact that Wilson learned by wireless from Mayo that a German vessel with war supplies for Huerta, to be used against the rebels, was almost due at Vera Cruz. In view of the conflict which Wilson's support of Mayo made imminent, it was to American interest to prevent the supplies from reaching Huerta.

with dignity from the embarrassing situation. A conference followed at Niagara Falls, Canada. After considerable discussion the mediators signed a protocol advising that Huerta give up his office and that he and Carranza agree upon a provisional president. Carranza, whose position had been strengthened by the lifting of the embargo on American arms, refused to coöperate and compromise; but Huerta, realizing that the situation was hopeless for him, resigned on July 15, 1914, and went to Europe.

The next month Carranza's army, under command of Álvaro Obregón, took possession of Mexico City, and in the following November the American forces were withdrawn from Vera Cruz.

Peace did not come to Mexico, however, for there were other aspirants to political domination who held out against Carranza as head. Francisco Villa for a time led a formidable insurrection against Carranza in the north, but he was defeated in April, 1915, by Álvaro Obregón. Minor resistance continued in other parts of the country; nevertheless the United States government late in 1915 recognized Carranza as the de facto head of Mexico and again banned the sending of war materials across the border, this time to aid Carranza in completely eliminating Villa. The latter, who had once been given hope of United States support, revenged himself in 1916 by killing eighteen Americans in northern Mexico and seventeen others by a raid on Columbus, New Mexico.

Since Carranza was too weak and harassed from other quarters to capture and punish Villa, he was forced to give the American government permission to do so. Then followed the "pursuit" of Villa into the wilds of Mexico under General John J. Pershing; but the restraints placed by President Wilson upon the movements of the army, out of regard for Mexican feelings, made the failure to capture the bandit almost a foregone conclusion. The most notable result of the Pershing expedition was a cost of more than $130,000,000 to the American people and the development of a deep suspicion in Carranza as to the real designs of the United States in its armed penetration of Mexico. Villa remained at large, a thorn in the flesh of Carranza, and, for a time, of his successor.

Carranza very soon disappointed the best-intentioned of his supporters, for he showed himself out of sympathy with their program. He was liberal and democratic in his tendencies, but without any interest in the masses; yet ambition had caused him to head the movement against Huerta, which stood for the restoration of the constitution of 1857, for stripping the Church of its power, for distribution of land to the landless, and for betterment of the status of labor. Immediately upon coming into power he showed himself reactionary and indifferent to the reforms promised, and also weak, stubborn, tyrannical, and generally inefficient.

However, he was forced by the radicals to support a new constitution incorporating various of the promised reforms, drawn up by a convention called to amend the old one. This document, which reduced the presidential term to four years and eliminated the vice-presidential office, was promulgated in February, 1917. The chief difference between it and the displaced constitution was in added portions showing a marked determination to secure and maintain "Mexico for the Mexicans," which had been one of the slogans of the Constitutionalist army. Accordingly it contained provisions strongly favorable to the rank and file and drastic measures against monopoly, foreigners, and the Roman Church. In its efforts to do justice to the downtrodden masses, it not only abolished peonage and provided for considerable enlightened social legislation, but also gave to labor rather extreme and somewhat tyrannical powers. All clergy were limited to purely religious activities; they were allowed no share in primary education, no control of charitable institutions, and no voice in the government. But the part of the new constitution that caused the greatest stir at first was Article 27, dealing with Mexican lands. This provided for the separation of the subsoil rights from the title to surface soil.

Much discussion was roused over the import of the article, but its intention was made clear by a decree issued by Carranza in 1918. It was meant to be retroactive; hence those working petroleum and other mineral lands under full title from Díaz were to be required to pay royalties, rentals, and special taxes. Most of the oil men were foreigners, especially Americans; and when the aim of the government became clear, in great indignation and dismay they worked to undermine the support that still remained to Carranza.

Carranza's Mexican enemies, however, hardly needed the help of foreign capitalists; for the misfit president was by his own acts fast losing most of his supporters. In his general administration of the government he almost from the first ignored the interests of the nation as a whole and, with the hope of maintaining power, catered to the grossly selfish professional militarists, who brazenly robbed the public treasury. Money due for teachers' salaries went into the pockets of officials or presidential favorites. This soon resulted in the closing of many of the schools that had existed under Díaz. Little distribution of land took place, and no attempt was made to put into effect the new constitution as a whole. The country was not pacified; instead, rebellion and general lawlessness spread, with increasing destruction of foreign lives and property. Interest on foreign debts was in arrears.

Álvaro Obregón, himself ambitious for the presidency, early became disgusted with Carranza's inefficiency and turned definitely against him when it became apparent that Carranza planned to impose his successor on the country. This defection was fatal; for Obregón, who had defeated Villa and lost an arm in doing so, was the country's most popular military hero and was doubtless preferred to Ignacio Bonillas, Carranza's candidate. The revolt in favor of Obregón began in April, 1920, in Sonora, his own state, which, as a measure of precaution against Carranza's plan to manipulate its government in the interest of Bonillas, seceded and became the "republic of Sonora." The revolutionary movement made rapid headway; soldiers from Carranza's army went over by thousands to Obregón. The Liberal Constitutionalist party, as the champions of Obregón called themselves, had for their chief slogan "Effective suffrage and no reëlection," but it also favored land distribution, better conditions for labor, and social reforms in general. As soon as the movement was well launched, the revolutionary leaders demanded that Carranza resign.

He failed to do so; but, realizing his danger in the capital, he decided to withdraw his government to Vera Cruz. Early in May, 1920, he started to do so, using twenty-one trains to carry troops, government officials, employees and parasites, national treasure, and national archives; but before the party got very far on its journey the trains were attacked and the presidential troops were defeated. Carranza, now only hoping to escape from the country, fled toward the northwest. On the night of May 18, while he was sleeping in a mountain hut in the state of Puebla, he was murdered.

Obregón, who entered Mexico City with his troops a few days after Carranza had departed, apparently was in no way responsible for the crime and received no blame. To fill out Carranza's term until November, congress chose Adolfo de la Huerta, governor of Sonora. At the regular election Obregón was named president, and was doubtless the national choice. He appointed his cabinet from the radical element, and on the whole had a strong group, two of the ablest being Adolfo de la Huerta, secretary of the treasury, and José Vasconcelos, secretary of education.

Both foreign relations and domestic matters presented most difficult tasks to the new president. Not only were external debts in very unsatisfactory shape because of arrears in payments and because of a vast number of new claims for losses sustained during the recent disorders, but the constitution of 1917, which millions of Mexicans wished to see put into effect, was an object of foreign resentment because of its provision regarding land titles. Foreign nations, especially the United States, could not be ignored; for security of position and the chance to borrow much-needed money depended upon recognition by other governments.

American capitalists, whose investments in Mexico were especially heavy, urged that their property rights be guaranteed by treaty as a preliminary to recognition; but Obregón refused to grant such a pledge on the ground that it would give foreigners more security than Mexicans themselves had. In 1922, however, some assurance was given by a decision of the Mexican supreme court, which held in a certain case that the provision of the constitution regarding rights to the subsoil could not be construed as retroactive. Under Mexican judicial practice it takes a number of decisions to fix the interpretation of a law; but in April of the next year Obregón issued a decree to the same general effect, and this paved the way for negotiations with the United States looking toward recognition. A few months later a Mexican-American commission sitting at Mexico City reached definite agreements over the questions that had been giving difficulty. It was understood that subsoil rights secured by Americans before May, 1917 (when the constitution went into effect), should be respected; that Americans losing lands because of expropriation to secure soil for the landless should receive fair compensation; and that existing claims against Mexico should be adjusted by means of special commissions. These matters arranged, the United States formally recognized the Obregón government on August 31, 1923. Recognition by France and England was given somewhat later.

Before this took place Adolfo de la Huerta was able to make arrangements with a committee of international bankers for the refunding of the Mexican foreign debt, which, with the arrears in interest, totaled about $700,000,000.

Obregón's domestic policy gave a new turn to Mexican history. During the period of nine years between Díaz's fall and Obregón's coming into office virtually nothing (except for the adoption of the rather embarrassing and unwieldy constitution of 1917) had been done to put into effect the principles avowed by the various revolutionary leaders. Obregón set vigorously to work and made good a number of pledges for reform.

Carranza had been strongly opposed to the organization of labor. The right to form unions, however, was granted in the constitution of 1917; therefore, despite a hostile government and the bitter opposition of employers, a national body of workers, the *Confederación Regional Obrera Mexicana* (commonly known as the C. R. O. M.), was organized in 1918 and grew steadily though slowly. When Obregón came into the presidency, it had about fifty thousand members. Under definite encouragement from his administration, its numbers increased to twelve hundred thousand by the close of 1924. For several years its general secretary was Luis N. Morones. National organizations of special workers grew in proportion. The general condition of industrial labor was much improved, and laborers developed new hope and self-respect.

During Obregón's term, for the first time in the history of Mexico, plans were made and launched to educate the whole nation. The leader placed in charge of the new movement was José Vasconcelos, rector of the National University, who was made head of the newly created secretariat of education. Significant of a new emphasis was the fact that two showy and expensive public structures begun by Díaz were permitted to stand uncompleted while money was appropriated for the construction of a large and substantial building to house numerous educational offices. Under Dr. Vasconcelos a comprehensive and revolutionary program for Mexican education was adopted. It aimed to secure well-trained teachers; to stamp out illiteracy; to teach Spanish to many thousands of inhabitants equipped only with aboriginal tongues; to supply the country with adequate public libraries, and throughout it all to develop national pride, ambition, and unity by acquainting the population with the culture of its aboriginal past. In an effort to accomplish this last aim, much stress was placed upon pre-Cortesian history, native music, and the art of the early Mexicans as shown in the archæological remains. In the execution of the general program primary and secondary schools were modernized and increased in number through the use of national funds to supplement the work of the states, thousands of volunteer workers (children as well as adults) gave their services toward privately teaching those who wished to learn to read and write, special "mission" teachers were sent to work among the un-Hispanized Indians, and hundreds of libraries of well-selected books were distributed throughout the country.

The work of general education was well launched and was expanding perhaps as rapidly as various handicaps permitted when a setback came through a revolution connected with the presidential campaign. Obregón's choice for his successor was Plutarco Elias Calles, his secretary of war, whom various other leaders, including Adolfo de la Huerta, agreed to support. But de la Huerta developed ambitions of his own. In September, 1923, he resigned his position, charging that Obregón was trying to impose Calles upon the country, and proceeded to work for his own election. He received the nomination of a newly organized Coöperatist group; Calles was named by the National Agrarians. Bitter charges and counter charges followed; and in December a revolt in behalf of de la Huerta broke out in several states. The movement was strong and menacing since it had the backing of the Díaz conservatives as well as of many radicals and liberals. Obregón and Calles both marched to battle, but for a time the outlook for the revolutionists was bright. The tide was turned, however, through aid of various sorts from the United States, and within a few months the revolt was crushed. The cost of restoring order added much to the country's financial burdens and left little for education, and José Vasconcelos, through declaring himself neutral in connection with the rebellion, lost his position as the head of the educational system of the country.

As was a foregone conclusion, after the uprising was put down Calles won the election of 1924, and for the first time in the troubled history of Mexico the outgoing president accompanied his successor to the inaugural ceremonies of the latter. Calles's policy was in general a continuation and expansion of that of Obregón. The new president, however, partly because he was in a securer position from the first than his predecessor was and partly because of his greater strength of character, introduced and carried out fairly well a "moralization" program, which meant the elimination of a great deal of the extravagance and graft that had caused the Obregón administration to be bitterly attacked.

Calles was even more avowedly friendly to labor at the outset than was Obregón, and by the close of 1927 the C. R. O. M.

had two million and a quarter members. Before his term ended, however, labor strikes for unreasonable causes (which had begun in the preceding administration) became very serious, and the president repeatedly interfered to prevent national paralysis. Disturbances also took place as a result of quarrels between various labor groups, and by 1928 the C. R. O. M. began to lose some of its strength. Furthermore, times were hard in Mexico and employment was scarce, a situation that caused hundreds of thousands to cross over into the United States to engage in seasonal labor or to establish themselves there permanently.

Though land distribution had taken place under Carranza and Obregón, the nation had gained little from it; for the procedure had not been carefully planned, and under new control the lands in many cases lay idle for want of farming tools and water for irrigation. The Calles administration profited by this situation and, although continuing to break up the latifundia and apportion farms on a large scale, gave intelligent attention to local conditions and tried to meet the needs and to enable persons who received lands to make prompt use of them for agricultural purposes. As an aid in this direction, irrigation and road-building projects were made and the execution of these was begun.

It was perhaps with greater energy that the government attacked the problem of securing general education; much was accomplished in the four years, especially in view of the fact that the new term began with a treasury emptied by the de la Huerta revolution. Nearly four thousand additional rural schools were established; eight open-air schools were introduced in the capital; three new art schools were built; large agricultural schools were founded in seven of the states; and an earnest effort was made to force employers, in conformity with a new law, to supply elementary instruction to their men.

The work undertaken by the government in the interest of public health was a newer departure. Under Díaz sanitary conditions were practically no better than in colonial times. Carranza and Obregón began with far larger appropriations for hygienic purposes than had existed in Díaz's day; but the sums spent were quite inadequate even for a beginning, and nothing serious was attempted. Calles increased the sum assigned to health work from 2,796,847.70 pesos in 1924 to 8,403,547.50 in 1927, and the department of health spent these sums in the interest of better sanitary conditions of all kinds. Free dispensaries and clinics were established; a new sanitary code was adopted, which was vigorously enforced, and resulted in cleaner market places and purer milk supplies; public baths were opened and bathing was encouraged; and vaccination against various diseases was undertaken on a large scale. Five million people were vaccinated in one year in an effort to stamp out smallpox, one of the most serious scourges of the country.

In his relations with the United States, Calles was less wise, for his administration determined upon a retroactive interpretation for Article 27 of the constitution. This decision may possibly have been crystallized by the American ambassador, James R. Sheffield, who, influenced by American petroleum men in Mexico, interpreted the Mexican government to the Washington authorities in an unsympathetic manner. One of the first results of this was a very undiplomatic statement made by Secretary of State Kellogg to the American press on June 12, 1925, in regard to Mexican relations in general and to American property rights in Mexico in particular. Calles replied in tones equally undiplomatic. Later in the year a law was passed requiring that those having oil properties in Mexico report them to the government and have them changed into fifty-year concessions. Failure to do so before January 1, 1927, would result in confiscation. Another law, passed in the same year, required foreign corporations owning agricultural lands to sell enough shares to the Mexican government to give it a controlling vote in their organizations. This measure caused indignant criticism, but there was rather general compliance. Only the smaller oil concerns, however, obeyed the first law; a number of large American companies that had controlled most of the petroleum output of the country held out. The government retaliated by canceling their drilling permits, in consequence of which

Mexican oil production fell off greatly; but no step was taken to confiscate the properties, doubtless because the Calles administration felt that to do so would precipitate war with the United States.

For a time it seemed that war would come in any case. The United States government declared the retroactive law to be confiscatory in itself, and an angry correspondence followed that seemed constantly to take the two nations farther from settlement. Finally, late in 1926 it was rumored through the press, by inspiration of the American Department of State, that Mexico was spreading Bolshevik propaganda throughout Central America, where the Díaz-Sacasa difficulty in Nicaragua was at the time attracting attention. In the following January Secretary Kellogg presented before the Senate Committee on Foreign Relations a memorandum of what he declared to be evidence of "Bolshevik Aims and Policies in Mexico and Latin America." By some Americans this was taken very seriously, the situation became more tense, and war against Mexico as a sort of American ally of Moscow was urged; but most of the press met the charges with scoffing criticism of the Department of State; and the nation as a whole, through protest and petition, expressed opposition to war with Mexico over the oil question. The Senate reflected the sentiment of the population, and on January 25, 1927, it voted unanimously for arbitration of the controversy. Thus Secretary Kellogg and President Coolidge found themselves without support. This somewhat relieved the tension, and a few months later Mr. Sheffield, apparently in response to Coolidge's wishes, resigned as ambassador to Mexico. A new era in relations between the two countries was begun by the appointment to the office of Dwight W. Morrow, long associated with the banking firm of J. P. Morgan and Company.

Mr. Morrow at once assumed an understanding and neighborly attitude toward the Mexican nation and its government and soon was on very friendly personal relations with President Calles, who was glad to receive from the American financial expert advice upon puzzling economic questions. Owing partly to the attitude of the new ambassador, partly to the fact that

Calles's financial needs made it impossible for him to continue in defiance of the United States, the policy of Mexico also changed. In December, 1927, the congress of the country passed a law doing away with the arrangement for fifty-year concessions and providing for concessions of indefinite length, which Ambassador Morrow declared to be practically a confirmation of old titles.

To the better relations caused by Morrow's influence and the new law was added for a short time what almost amounted to Mexican enthusiasm for the United States as a result of an air trip to Mexico (at the suggestion of the ambassador) of the transatlantic flier Charles A. Lindbergh. This friendly gesture was returned by Emilio Carranza, the leading Mexican airman, whose death, caused by a storm after the beginning of his flight home, served further to increase sympathetic understanding between the two neighboring nations.

A question quite untouched when Calles came into the presidential office was that involving relations with the Church, for no real attempt had been made to put into effect the anticlerical portions of the constitution. Obregón evidently had not felt in a sufficiently strong position to attack the problem, and even his successor ignored it for a time; but the issue was joined for him by the Church itself, which had been contemplating the new constitution with hostile fear. The archbishop took the initiative, through the columns of *El Universal*, a leading Mexican daily. In the issue of February 4, 1926, appeared a statement by him to the effect that for the clergy to obey certain articles of the constitution would make them traitors to their faith and religion; therefore they did not recognize them and would combat them. The Calles government responded by enacting numerous laws for the interpretation and enforcement of the constitutional articles in question. These new measures called for prompt registration of all clergy with the government, demanded that the law against foreigners engaged in religious ministry be obeyed, and forbade the teaching of religion in primary schools. Though the clergy resented all the legislation, they were especially hostile toward that calling for registration, since obedience to this would imply a peculiar subordination of Church to State in the Mexican Republic.

The Protestant clergy at once complied with the laws, but the Roman Catholics ignored them; consequently the government closed Catholic primary schools and nunneries and deported numbers of foreign churchmen. The Roman hierarchy in Mexico retaliated by instructing all priests to cease functioning in the churches. The religious strike went into effect on August 1, 1926; but the churches were kept open by order of the government, and services were conducted and certain sacraments administered by specified lay individuals.

This move of the Church caused much popular excitement and a deadlock between it and the government, but it failed to bring the general demonstrations against the government for which the leading clergy had hoped. Under the slogan "*Viva Cristo Rey!*" (Long live Christ the King!) the Church party, or *Cristeros*, repeatedly started disturbances, some of them led by clergy, in different parts of the country; but the disorder failed to spread, and the leaders were harshly punished. By the early summer of 1927 it was apparent that the clerical boycott was a failure.

It was also clear that little was to be hoped from the next administration in the interest of the Church's point of view, for Obregón aimed to succeed Calles and had Calles's support. In preparation for this arrangement Calles issued a decree in January, 1927, stating that a man who had been president could be again elected to that office after an interval out of it. Two others, Francisco Serrano and Arnulfo Gómez, came out against Obregón on no-reëlectionist platforms, and in October, 1927, started a revolution. The uprising was quickly put down, and the two opposition candidates were captured and shot. This left the field clear for Obregón. He was declared victor in the election that took place on July 1, 1928, but on the seventeenth of the month he was assassinated by a religious fanatic. The long, careful trial which preceded the murderer's execution revealed the fact that, contrary to original opinions, the Roman clergy were not directly involved in the crime.

Calles's term was to expire on November 30, 1928, and there was much fear that the nation would be thrown into political chaos by the tragedy; but Calles showed real leadership in the crisis, and calm and order prevailed. In September congress elected Emilio Portes Gil, minister of the interior, who had been governor of Tamaulipas, as provisional president, to serve until February 5, 1930. On December 1 he quietly assumed control. Calles declared it his intention to retire permanently from public life; but when a revolt against the provisional government broke out in March, 1929, he headed the army which set about putting it down. The uprising was at no time very formidable, and it was ended in two months, but not before large sums of money badly needed for other purposes had been spent in warfare.

President Portes Gil, in accordance with a public pledge made when he took office, followed the general policy of the Calles administration; but he also launched a reform program of his own in the spring of 1929 by beginning a campaign against alcoholism, gambling, and vice. The governors of twenty states promised coöperation in his plan to work for the restriction of the saloon and the education of the nation upon the evil effects of excessive drinking of liquor.

When Portes Gil assumed office the Church strike still existed; but in some public remarks made on May 1, 1929, the new president offered an opening for negotiations by stating that the clergy could resume their regular functions at any time with the simple obligation that they respect the laws of the land. Influenced by Ambassador Morrow, the Mexican archbishop (at the time in the United States) expressed willingness to negotiate. By the latter part of June a compromise agreement had been reached by the Church and the Mexican government, whereby the former was granted the right to select for specific charges priests who, after their appointment, were to register with the minister of the interior. Parochial schools were prohibited, but clergy might teach religious doctrines to both children and adults "within the Church confines." Though the clergy were not permitted to vote, their right of petition was specifically recognized. On the whole the pact was a triumph for the State. Promptly after the adjustment was made the Roman priests resumed their duties.

In the presidential election of November, 1929, the candidates were José Vasconcelos, minister of education under Obregón, and Pascual Ortíz Rubio, who had been in the cabinet of Adolfo de la Huerta and had filled diplomatic posts. The former was supported by the Anti-Reëlectionists and the latter by the National Revolutionary party. The victory went to Ortíz Rubio, who was understood to favor the agrarian and other policies of recent administrations, and he assumed office in February, 1930.

XXI

NEW GRANADA, OR COLOMBIA, AND PANAMA

Liberty, says Rousseau, is a succulent food, but difficult to digest. Our feeble fellow citizens will have to strengthen their mind much before they will be ready to assimilate such wholesome nourishment.

From the address by Simón Bolívar at the Congress of Angostura

THE DISRUPTION OF GREAT COLOMBIA

THE Colombia which Bolívar completed by his proclamation of May 29, 1822, after the liberation of Quito, was destined to be short-lived, for within it were influences making strongly for disintegration. The region included in the republic was almost as great as the portion of the United States to the east of the Mississippi River and was broken by the majestic walls of the great Cordillera into a number of sharply marked geographic provinces, which encouraged political separatism. The tradition of governmental solidarity was also lacking, for during the last century under Spain the territory had formed three distinct administrative divisions united only by the crown. Bolívar hoped to overcome existing disruptive tendencies by creating a strongly centralized government; but his efforts proved vain owing to the ambition and jealousy of the country's leaders and to the fact that Santander, who was in charge of the government as vice president while Bolívar, the president, was completing the overthrow of Spanish power, favored and promulgated federalist principles.

For a brief period, however, the outlook seemed promising in a superficial way. The congress that met in Cúcuta in 1821 drew up the constitution under which Bolívar and Santander were elected, gave to the president absolute power in the case of a crisis, and enacted a number of enlightened and progressive laws. These abolished the Inquisition and decreed religious tolerance, prohibited the collection of tribute from the Indians and the African trade in Negro slaves, and provided for the gradual abolition of slavery in Colombia. Later congresses passed laws to encourage commerce and immigration. Meanwhile some of the local governments set vigorously about establishing primary and secondary schools.

During these early years various countries recognized Colombian independence, the United States taking the lead, as has been mentioned. Numerous treaties of friendship and commerce followed. The Papacy, despite objections of Spain, also entered into relations with the young republic.

Even before it had done so, however, there began to develop the "Church question," which was one of the chief reasons for factional strife during the next hundred years. The immediate cause for friction with the clergy was governmental tolerance toward Protestantism combined with a tendency to restrict the power of the Roman Church. Agents of Bible societies were permitted to work in the country, and Santander did nothing to restrain Liberals active in forming anticlerical Masonic lodges. A law was passed closing all convents having less than eight residents, and another was enacted which aimed to give the government control of the Church patronage. The latter measure was fought bitterly by the clergy and by various lay supporters of the Church in congress.

It was not the Church question, however, that precipitated the discords leading directly to disunion, but relations between laymen. Santander, though progressive in many ways and liberal in theory, had by 1826 made many prominent leaders his enemies because of his tyrannical treatment of those who opposed him. In that year serious trouble took place in Venezuela, where there was a growing dislike of Santander and jealousy because Bogotá had been made the seat of the national capital. José Antonio Páez was summoned by congress to the capital to answer for using harsh methods of conscription in Venezuela. Instead of obeying he headed a disgruntled faction and assumed military and civil control of the territory. Santander appealed to Bolívar for help, as did also Páez—against Santander. Accordingly the Liberator returned from the south, and by the use of much tact toward the acts of Páez, whose aid in the freeing of Venezuela he had not forgotten, regained his loyalty and left him unpunished. This moderation was resented by Santander, between whom and Bolívar difficulties were growing over political principles. Hardly had the trouble with Páez ended when a revolt against the central authorities took place in Quito.

Much of the resentment and unrest manifested at this time, especially by the liberal federalist element, was caused by fears that Bolívar would yield to growing demands that he become the crowned monarch of Colombia. Though he repeatedly denied having royal ambitions, and declared, "I am not Napoleon, nor do I wish to be; neither do I want to imitate Cæsar, and still less Iturbide," his sincerity was questioned, and suspicion and ill feeling grew against him.

At a convention held in Ocaña in April, 1828, to amend the constitution bitter factionalism became dominant. One side favored Santander and federalism; the other supported Bolívar and the plan to maintain a strong central government. The latter, feeling their cause hopeless, seceded from the gathering, which broke up with nothing accomplished. Shortly afterwards insurrectionary disturbances became so serious that congress gave Bolívar dictatorial powers to enable him to restore order. This fact was seized upon by his enemies as evidence of his political ambitions and tyrannical aims. On September 25, 1828, an unsuccessful attempt was made against his life. A number of the conspirators were caught and executed; and Santander, whose guilt was suspected but could not be proved, was for a time imprisoned and later sent into exile.

Soon came conflict with Peru over territorial claims, then an uprising in Cundinamarca, and late in 1829 a move for secession in Venezuela. In April, 1830, Bolívar gave up his authority as head of the state, for by this time he was very ill with tuberculosis and, furthermore, he believed that he could no longer be of aid to his country. Congress voted him a pension and he departed, intending to retire to Europe. At Cartagena his depression was increased through receiving word that Sucre, his best friend and ablest lieutenant, had been assassinated in June, 1830. Two months before this Venezuela, under the lead of Páez, had declared independence of the rest of Colombia, and the violence and disorders in other parts had increased. Bolívar, in a letter written in the autumn to General Juan José Flores of Quito, expressed his discouragement, declaring, "He who dedicates his services to a revolution plows the sea." On December 1, 1830, he reached Santa Marta on the north coast of Colombia. Feeling that his end was near, he issued a final public appeal to his countrymen to obey the laws and work for the solidarity of the state. On the seventeenth of the month he died at Santa Marta.

Even before the heartbroken Liberator breathed his last, the Colombia which he had created by fiat was a complete wreck, for Quito, under the lead of General Flores, had followed Venezuela in secession. During the past century there has been some dreaming and talking of the restoration of Great Colombia, but nothing serious has been attempted toward its achievement; however, under the conditions which have existed the task of restoration would be even more hopeless than the reconfederation of Central America.

NEW GRANADA

Late in 1831 an assembly in the deserted middle portion of Colombia voted to retain the former name of New Granada for the sovereign state and indicated that its boundaries should be those of the old viceroyalty, and the state proceeded upon its independent way. Its course proved a very turbulent one; but two facts are notable in this connection: though there have been many revolutionary uprisings in the country, very few of them have succeeded in overturning the government, and most of the wars that have rent the country have been fought in an effort to solve serious political problems.

Early in 1832 a constitution providing for a centralized government was adopted and Santander was elected president for four years. He was absent from the country at the time, but in the autumn he arrived and assumed control. His internal policy continued progressive as formerly. One of the first matters to secure his attention was the restoration of the schools, which recent disorders had virtually eliminated, and the starting of new ones. The professional schools at Bogotá, Popayán, and Tunja were given support; an eminent scholar was placed at the head of the astronomical observatory in the capital; and the National Academy, which had been founded a few years before to stimulate interest in learning, was revived. The influence of the Church in education was reduced, and the writings of advanced thinkers were studied, to the indignation of the clergy.

As a result of the aid given by Englishmen toward independence, and of the continuance of some of them in the country, English methods of instruction were adopted to some extent, and the upper classes showed a preference for English fashions in dress and amusements.

Unfortunately, in his personal relationships Santander showed his former harshness. Not only were Bolívar's old followers excluded from office, but all who in any way criticized the president were treated brutally. Among the latter were the clergy, upon whom Santander's government placed new restrictions. This attitude, and the fact that in an agreement with Venezuela and Ecuador (Quito) New Granada had assumed half the Colombian debt (which was thought an unjust proportion), caused much resentment against Santander and led to the defeat of his candidate, a military man, in the next presidential election. The victor was José Ignacio Márquez, a civilian and eminent jurist who was vice president under Santander.

Márquez had resented the tyranny and militarism displayed by Santander, and tried to reduce the influence of army officers and to eliminate battlefield methods and factionalism by making drastic cuts in the army and navy; but otherwise he followed the policies of his predecessor, working in the interest of intellectual enlightenment and economic advancement. The country prospered, and payments were made on the national debt. For a brief time it seemed as if peace and progress had come to New

Granada to stay; but in 1839, two years after Márquez's accession, a rebellion, led by a priest who resented the fact that the new president had suppressed some of the smaller convents, broke out in the south. Though this was put down, there followed other uprisings, headed by ambitious politicians, who were to some extent incited by Santander. Soon the country was plunged into a blighting civil war, which ended, however, in favor of the administration.

Before the struggle was over Pedro Alcántara Herrán, commander of the government forces, was elected president to succeed Márquez, for it was felt that now a strong military man was needed at the helm; and in the interest of maintaining order the constitution was amended to give the executive greater authority than before through extending his veto power and giving him the right to appoint and remove national officials and provincial governors. Herrán followed the liberal, progressive policy of his predecessors and sought to cover the scars left by the war. Special attention was given to the restoration and extension of the schools. The Jesuits were permitted to enter the country to work among the aborigines, but the general restrictive policy toward the Church was continued. A census taken during Herrán's administration showed the republic to have about 2,100,000 inhabitants.

The successor to Herrán, elected in 1845, was Tomás Cipriano de Mosquera, a highly cultured man of aristocratic family who, in his energy, audacity, frankness, and self-confidence, had much in common with Theodore Roosevelt. He was of the same political group as Herrán and Márquez, to whom the opposition, who called themselves Liberals, now began to apply the name "Conservatives." Mosquera's administration was one of unparalleled progress for New Granada. Definite steps were taken toward abolishing the slave trade and slavery.[1] The National Library was expanded, and attention was given to education, especially along practical lines for the purpose of training engineers and other technical experts; but most of the administration's interest was devoted to economic development. With this in view the French metric system of weights and measures was introduced, better business methods in general were encouraged, and a national decimal currency was adopted. Numerous wagon roads were built, and steamboats appeared regularly on the Magdalena River. In 1846 a treaty was made with the United States giving to American citizens the right of way for transit across the Isthmus of Panama. In return the American government guaranteed the neutrality of the route and New Granada's right of sovereignty over it. Shortly afterwards an American company began building a railroad across the Isthmus. It was completed in 1855, the first railway in New Granada.

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[1] The antislavery laws passed by the Colombian government had not been enforced and were not reënacted when the government of New Granada was set up.

Largely because of the European revolutions of 1848 a new spirit began to show itself in New Granada in the latter half of Mosquera's term. In the cities labor became self-conscious and organized "democratic" clubs, which served to stir up political unrest throughout the nation. The president, perhaps from conviction as well as policy, moved with the tide and surprised the opposition by pardoning all political exiles and appointing a number of Liberals to prominent positions. This strengthened the opposition party, and the Conservatives were weakened by a split over the presidential election. Since no candidate had a majority of votes, the decision was left to congress, which, in March, 1849, gave the victory to the Liberal candidate.

This election may be regarded as formally ushering in a period (somewhat foretold by Mosquera's facing about) of governmental decentralization, great theoretical democracy and liberty, and strong anticlericalism, accompanied by much lawlessness and internal warfare. During most of this era of thirty years the Liberals were dominant. At first, influenced by Mosquera's conciliatory policy, they were fair and moderate and gave the Conservatives a share in the government; later, owing to the intrusion of the Church question, deep bitterness developed between the two groups, and the clergy became the mainstay of the Conservatives, which gave the latter a reactionary tendency, whereas the Liberals, reënforced by Masonic lodges, showed increased opposition to the Church.

It was José López, successor to Mosquera in 1849, who began the drastic attack upon the Roman Church in New Granada. Until then that institution, although somewhat trimmed by the government and ignored by it, had most of its ancient privileges intact. Now it was stripped and weakened: tithes were abolished and also ecclesiastical courts and the right to asylum in the churches, and the Jesuits were expelled. Under López's Liberal successor a law was passed in June, 1853, separating Church and State. Complete religious freedom had been guaranteed by a new constitution adopted in the preceding month.

This document was the first formal move away from the aristocratic, centralist constitution which went into effect ten years before. It granted manhood suffrage and empowered the provinces to elect their own officers, administer their affairs, and have full authority over the municipalities lying within their borders. Slavery, abolished by López, was absolutely prohibited by the new constitution, which also guaranteed freedom of speech and of the press and other personal liberties.

The impulse given by this frame of government to political decentralization led in 1855 to an amendment permitting the various provinces of the country to become federal states. Panama, always restive under national control, was the first to take advantage of the new freedom thus offered; other states followed; and in 1858 congress adopted a constitution for the country, which was renamed the *Confederación Granadina* ("Granadine Confederation"). As in the case of the preceding constitutions the chief executive was to be elected for four years, and there was to be a bicameral congress, in which, in the case of the new constitution, the states were to be represented merely as states. To them, furthermore, were given all powers not specifically reserved to the national government; but the makers of the constitution forgot or neglected to define the latter!

The omission was a serious one, for soon the country was plunged into civil war over two measures promulgated by the national government. The one called for inspection of election returns by the central authorities; the other made state officials responsible, under some conditions, for disorders within their jurisdiction. The first, which virtually placed the elections in control of the party in power, caused deep resentment; the second roused Tomás Mosquera, now governor of Cauca and leader of the Liberal party, to protest against it and to announce that Cauca had "reassumed its sovereign powers." Other states quickly followed suit; the "confederation" disintegrated; and the "sovereign" states engaged in warfare with the authorities at Bogotá, which was captured by Mosquera in July, 1861.

After disposing of various national authorities with a high hand, Mosquera issued a number of decrees against the Church. The Jesuits, who had returned to the country, were expelled and their property was confiscated; all monastic houses and other religious corporations were suppressed, their property going to the government; and no priest was permitted to preach without the permission of the civil authorities. Various churches were closed for defying orders, and the archbishop and a number of bishops and priests were banished from the country.

Colombia

Before thus eliminating his opponents Mosquera had assumed the title of provisional president of the "United States of New Granada"; but in a pact of union adopted later in the year the name was changed to the "United States of Colombia," to the confusion of the layman. Renewal of civil war prevented a constitution from being adopted until 1863, but the one that then went into effect showed a slight reaction in the direction of centralism, as would be expected. Some restriction was placed upon control of their own affairs by the states; but the national government was forbidden to wage war against the states without the consent of congress and without first trying all possible means to secure adjustment of differences. Mosquera was elected for the two-year term provided by the new constitution, and was reëlected in 1866; but inasmuch as he showed a growing tendency to be dictatorial and quarreled with congress, he was overthrown in 1867 and sent into exile.

The Liberals remained in power during the next seventeen years, retaining office by the customary methods. Though revolutions were almost epidemic in Panama and there were repeated disturbances in the other states, something was done toward mending the damages caused by the earlier period of greater strife and toward bringing the country into line with progress. The University of Bogotá and also many schools which had been closed were opened, telegraphic communications were extended, a few short railroad lines were built, and in 1878 a concession was granted to a French company to dig a canal across Panama.

Meanwhile forces were at work which later brought about the overthrow of the dominant element and the return of the opposition party to power. One of these was the bitterness toward the Liberals created among the clergy by some of the members of the Liberal party, especially Mosquera. Another factor was a split of the Liberal party into a radical faction and a more moderate faction. Finally, there was an individual who had a political theory to work out. This was Rafael Núñez, a publicist and once a socialistic radical, who abandoned his earlier views "before the persistent suggestions of experience," as García-Calderón puts it. Through watching the painful and apparently futile political flounderings of his country for many years, he developed a horror for "the multitude of partial sovereignties"[1] and came to believe that federalism and internal disorder went together in Colombia; hence he gradually developed a specific plan intended to remedy the situation. Not until after he had served as Liberal president of the country from 1880 to 1882, however, after another bitter civil war lasting almost four years, did he set about spreading his ideas.

When his term of office was ended he wrote articles for the press urging the establishment of a political party that would work for the reorganization of the government in the interest of peace and progress. A visit to Europe during this period seems to have made him more fixed in his determination than ever; and after his reëlection as president in 1884 he helped to form a new political party known as Nationalist, made up of Conservatives and the Independents, who formed the moderate wing of the Liberal element. In 1885 he had a national council of states called to reform the constitution. In his address before the gathering, which was composed of Independents and Conservatives, Núñez showed extreme reaction from the views once held. The political achievements of the past quarter of a century, he declared, were all destructive; therefore he advocated a centralized, nationalistic form of government and an educational system that should exist chiefly in the interest of teaching the Christian doctrine. Special point was given to his statements by the fact that only two months before there had ended, with disaster to the Liberals, what was perhaps the most devastating civil war the country had experienced.

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[1] Carlos Pereyra, *Historia de América Española*, Vol. VI, p. 312.

The national council, which had been carefully chosen to meet Núñez's needs, decreed that the nation should be called the Republic of Colombia and proceeded to make a constitution on the principles laid down by the president. The document, which represented much labor and compromise, was promulgated in August, 1886, after being approved by Núñez and the municipal councils. As was to be expected, it was strongly centralist and pro-clerical and represented a swinging back of the pendulum from more than five decades of movement in the other direction. The extremes to which it went merely matched the fanatical decentralizing and anti-Romanist policies of the radical Liberal element. Under the constitution of 1886 the former "sovereign" states were demoted to the status of departments headed by governors appointed by the president. The latter, who was to be elected directly for a term of six years, had the right to supplement by decrees the legislation enacted by the bicameral congress. Roman Catholicism was declared to be the religion of the nation and under the protection of the government, but freedom of conscience and of worship was promised so far as it was not opposed to Christian morals or to law. Public education was to be in harmony with Roman Catholic teachings. The constitution of 1886 is still in effect, and such amendments as have been added have tended to increase its centralistic character.

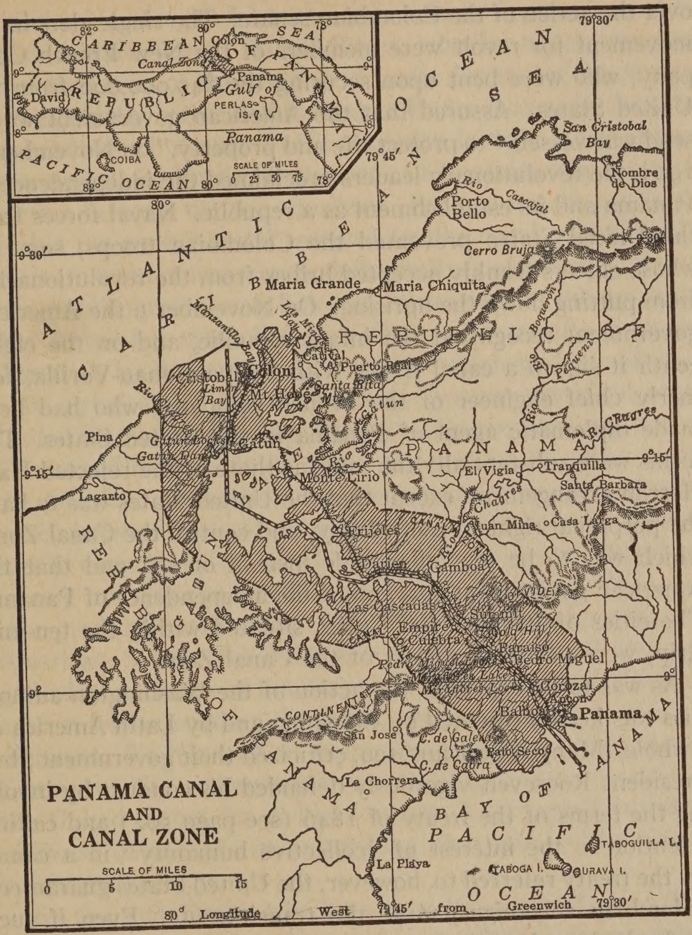
Through bringing about this frame of government, Núñez, a radical turned conservative, forced back into political centralism and official Roman orthodoxy the nation, which—partly through Mosquera's shift from conservatism to liberalism—had been led into extreme federalism and anticlericalism.

From the adoption of the constitution until his death in 1894, Núñez was president of the country and exercised practically dictatorial powers; but on the plea of poor health he spent much of the time at his home in Cartagena and ruled through the vice president or some other deputy. One of his earliest acts as president was the arrangement of a concordat with the papacy, which went into effect in 1888, giving back to the Roman Church in Colombia all the powers and privileges it had possessed during the colonial régime, except inquisitorial authority, and providing for payment for confiscated ecclesiastical property.

On the whole the Conservative period proved much more orderly and peaceful than the preceding Liberal era; yet there was considerable disturbance, for the Liberals were unwilling to assume without a struggle the rôle of mere onlooking political "outs." During the first twenty years after their overthrow they repeatedly started revolts, which, however, the government was usually able to put down without much difficulty. But in 1899 a far more formidable uprising against the government began; for the Liberals, aided by sympathizers in Ecuador and Venezuela and also by Zelaya of Nicaragua, decided to make the most of a schism between the aged president, Manuel Antonio Sanclemente, a Nationalist, and the ambitious vice president, José Manuel Marroquín, a Conservative. Within a few months the struggle between Liberals and government forces had assumed the proportions of a civil war, and in the summer of 1900 it was made more bitter by the fact that Marroquín frankly seized the presidential power and made a prisoner of Sanclemente, who was charged with inefficiency. Not until June, 1903, was the war, considered the most blighting in the history of Colombia, brought to an end, with another defeat for the Liberals.

Yet more adversity was just ahead for the unhappy country owing to the fact that President Roosevelt was determined to have a canal built across the Isthmus of Panama. The French company, headed by Ferdinand de Lesseps, builder of the Suez Canal, had begun work on the projected waterway in 1878 and had continued its operations until 1889, when, after a revelry of extravagance and corruption, it became bankrupt. From the wreckage of the De Lesseps organization had been formed another, known as the New French Canal Company, ostensibly to complete the undertaking of its predecessor but actually to sell to the highest bidder the assets of the old company, consisting chiefly of work done on the canal. Years passed and the new company did no digging on the waterway.

In the meantime the war with Spain had made apparent to the American nation the need for a canal across the Isthmus; hence by agreement between Great Britain and the United States the Clayton-Bulwer Treaty was set aside, and this cleared the way for a canal built and controlled by Americans. A commission of engineers, appointed by the United States government, investigated the Nicaragua and Panama routes and recommended the latter for the proposed waterway, on the condition that the New French Canal Company sell its interests for $40,000,000. This the company finally agreed to do, which led to the negotiation in January, 1903, of the Hay-Herrán Treaty between the United States and Colombia. By this arrangement the United States was given a ninety-nine-year lease of a strip of territory ten kilometers wide across the Isthmus, and in return it agreed to pay $10,000,000 at once and an annual rental of $250,000. The American Senate ratified the treaty; but the Colombian congress, demoralized by the long civil war and rent by factionalism, refused its assent, as, of course, it had a right to do. The chief reasons given for refusal were that the price offered was not sufficient, and that the constitution prohibited the alienation of Colombian soil; but the underlying motive was probably the fact that if no new arrangement were made for building a canal before the contract of the New French Company expired in 1910, all the latter's assets, for which the United States government was willing to pay $40,000,000, would fall to Colombia. Delay would be profitable to Colombia.


CARIBBEAN SEA
Colon
Canal Zone
GULF OF PANAMA
Panama
Gulf of
PERLAS IS.
David
REPUBLIC
Panama
PACIFIC OCEAN
COIBA
SCALE OF MILES
0 25 50 75
82°
80°
78°
9°
8°
ATLANTIC OCEAN
CARIBBEAN SEA
San Cristobal Bay
Nombre de Dios
Rio Cascajal
Porto Bello
Cerro Bruja
Maria Grande
Maria Chiquita
Rio Boqueron
Rio Pequeni
REPUBLIC OF PANAMA
Manzanillo Bay
Las Minas Bay
Catival
Puerto Real
Colon
Cristobal
Limon Bay
Mt. Hope
Santa Rita
Gatun
Rio Chagres
Gatun Locks
Gatun Dam
Pina
Laganto
Rio Chagres
Monte Lirio
El Vigia
Tranquilla
Santa Barbara
Chagres
Juan Mina
Casa Larga
Frijoles
Darien
Gamboa
Las Cascadas
Summit
Empire
Culebra
Gold Hill
Paraiso
Pedro Miguel
Pedro Miguel Locks
Miraflores Lake
Miraflores Locks
Corozal
Ancon
Balboa
Panama
San Jose
C. de Galera
C. de Cabra
Palo Seco
La Chorrera
La Playa
REPUBLIC OF PANAMA
CONTINENTAL DIVIDE
CANAL
BAY OF PANAMA
PACIFIC OCEAN
TABOGUILLA I.
TABOGA I.
URAVA I.
PANAMA CANAL AND CANAL ZONE
SCALE OF MILES
0 5 10 15
80° Longitude West 79°45′ from Greenwich 79°30′
9°30′
9°15′
9°

THE PANAMA CANAL ZONE, THE CANAL, AND ADJOINING PARTS OF THE REPUBLIC OF PANAMA

President Roosevelt was unwilling to wait, however, and listened with pleased interest to rumors of a projected revolt in Panama. The Panamans feared that the chance for prosperity which a canal would bring would be lost through the American government's turning to Nicaragua; and felt deep resentment over the action of the Colombian senate. The ringleaders in the movement for revolt were members of the New French Company, who were bent upon securing the $40,000,000 from the United States. Assured that the American government would send war vessels "to protect life and property," on November 3, 1903, the revolutionary leaders proclaimed the independence of Panama and its establishment as a republic. Naval forces from the United States prevented the Colombian troops, some of whose officers frankly accepted bribes from the revolutionaries, from putting down the uprising. On November 6 the American government recognized the infant republic, and on the eighteenth it signed a canal treaty with Felipe Bunau-Varilla, formerly chief engineer of the French company, who had been made diplomatic agent of Panama in the United States. The terms were substantially the same as those of the rejected Hay-Herrán arrangement, except that the United States was to have the perpetual right to use, occupy, and control the Canal Zone, which was to be ten miles wide instead of six, and that the American government guaranteed the independence of Panama. The cities of Panama and Colón, situated within the ten-mile strip, were not to be a part of the Canal Zone.

As was to be expected, the action of the Washington authorities was keenly resented by Colombia and by Latin America as a whole. Many Americans, too, criticized their government; but President Roosevelt vigorously defended his conduct by invoking the terms of the treaty of 1846 (see page 502) and calling attention to the interest of "collective humanity" in a canal. By the treaty referred to, however, the United States guaranteed Colombian sovereignty over the transit route. Even if such pledge had not been included, it was preposterous for Roosevelt to pretend that the United States, under its obligation to keep open the transit route, was justified in adopting such measures as would prevent Colombia from putting down an insurrection within her own borders. Roosevelt's justification of his procedure on the ground that the world needed a canal also was invalid in view of the fact that the Nicaragua route was presumably quite available.

Colombia struggled long to gain redress for the loss of her most valuable asset. Rafael Reyes, who for nearly six years after the revolt of Panama was virtually dictator of the country, was especially active in this regard. Under Roosevelt there was no headway; but after Taft's accession in 1909, arrangements were negotiated for the settlement of all outstanding causes for friction between the two countries. Panama was to pay to Colombia the annual rental received for the canal, and Colombia in return was to recognize the independence of Panama. Colombian public opinion was, however, so opposed to the agreement that Reyes felt compelled to withdraw the treaties from consideration by an extra-legal assembly which he had called.

In 1914, after Woodrow Wilson became president of the United States, the Panama dispute was again taken up, and the Thomson-Urrutia Treaty was negotiated at Bogotá. In this the American government expressed regret that differences had arisen between the two countries and agreed to give Colombia special commercial transportation privileges on the Isthmus and to pay her $25,000,000 for the loss of Panama. The treaty was promptly ratified by the Colombian congress; but the American Senate failed to act, partly because of the energetic denunciations of the document by ex-President Roosevelt, against whose conduct the treaty was, of course, a severe indictment. To him and to many others the most objectionable feature of the arrangement was the expression of regret by the United States, for civilized nations have lagged far behind civilized individuals in recognizing the moral obligation for voluntary apology.

By the time Harding became president of the United States certain American capitalists were very anxious to get concessions for drilling in the newly discovered oil fields of Colombia, but these were not easy to secure under the existing unfriendly relations between the two countries. Hence in the spring of 1921 the United States Senate again took up the Thomson-Urrutia Treaty, omitted the expression of regret, and promptly ratified the measure. Late in the same year the Colombian congress assented to the agreement. In 1924 diplomatic relations were established between Colombia and Panama, and in the following year a boundary treaty was signed between the two.

One small gain came to Colombia through the loss of the Isthmus. This was the removal of a troublesome boundary dispute with Costa Rica, which fell to Panama. On the east and south, however, the limits between Colombia and four of her neighbors were unsettled. There had been friction with Venezuela over frontier territory, and the boundary question between the two had been submitted to the king of Spain, who rendered his award in 1891. But differences arose some years later between the commissioners of the two countries appointed to demarcate the boundary. The matter was referred to the federal council of Switzerland, which rendered a decision in 1922 in favor of Colombia. Later the boundary was demarcated by the arbiter. More vexatious was a dispute with Ecuador and Peru over lands to the south. Nationals of the latter country were especially active as rubber-gatherers in the disputed area. In 1911 Peruvian troops attacked those of Colombia north of the Putumayo River, which had been agreed upon as a provisional boundary; but a temporary adjustment was made and war was averted. The aggressiveness of Peru led Ecuador, the weakest of the three, to align herself with Colombia, thereby making possible a boundary treaty between the two, signed in 1916. In 1922 an agreement was reached between Peruvian and Colombian diplomats, but it was not approved by the Colombian congress until 1925, and the Peruvian congress delayed ratification for two years more. Conflicting frontier claims were long under discussion between Colombia and Brazil, and in 1928 the two countries signed a treaty intended to complete the definition of boundaries.

The shock of losing Panama helped to develop in Colombia a slight spirit of political compromise and conciliation in the interest of securing more peace and order; consequently in 1906 a law was passed providing for minority representation in congress and in the president's cabinet. Under Carlos E. Restrepo of Medellín, who came to the presidency in 1910, this measure was put into force with very gratifying effect upon the temper of the Liberal opposition. In the same year amendments to the constitution were adopted which required literacy, property, or income qualifications for voting for national officials, reduced the presidential term to four years, authorized the senate to pass upon the president's physical capacity to perform his duties, and provided that congress should annually elect first and second *designados* ("designates") to take over the work of the chief executive in case of necessity.

Giving the Liberals a share in the government through minority representation did much to eliminate bitterness over strictly civil matters and helped to free the country from revolutions; but Liberal resentment continued toward the favored Roman Church. A split in the Conservative party enabled the Liberals in February, 1930, to elect their presidential candidate, Enrique Olaya Herrera, Colombian minister to the United States.

Colombia, like all young countries, has had serious financial troubles and has found it difficult to meet payments on obligations. It was not until after Núñez came into power, however, that the currency problems became very serious, for the country had kept on a bimetallic basis and had had no paper money. Then a general business crisis caused prices to drop and gave a balance of trade against the country, and the result was a drawing away of money to pay for imports. The shortage thus created caused banks to issue an excess of notes. This seemed to give a fatal idea to Núñez, who was no financier, for in 1886 he decreed that the peso notes of the Banco Nacional, which he had founded in 1880, should be the unit of value. The bank was permitted to issue a maximum of four million pesos in bills (equivalent to about the same amount of United States dollars) with no obligation as to redemption, and the law required that all contracts be paid in paper money. The country was thus placed on a basis of unsound paper currency, but free coinage of a debased silver currency continued.

Nothing serious happened as a result of the law of 1886 until after civil war broke out in 1899, at which time there were about forty-six million pesos in notes in circulation, many of them issued by the government, which had taken the place of the Banco Nacional. Because of the need for funds to carry on the war, the national authorities decreed an unlimited issue of treasury notes (though there was no collateral in the treasury) and also authorized four of the departments of the country to issue paper money to meet their needs. The printing-presses set to work, and hundreds of millions of paper pesos were legally poured out upon the nation, and besides there were great quantities of counterfeit notes. Before the end of the war the paper peso had depreciated until it was worth less than one one-hundredth of its original value.

In 1903, when the war was ended, congress, in an effort to avert national ruin, forbade the further issuing of paper, adopted the gold dollar as standard, decreed that contracts might be paid in either paper or gold, and created an amortization board which worked to eliminate the paper by redeeming it with gold. This board was empowered to auction off gold coming from certain national revenues in return for paper and to burn the paper. By this means great stacks of fiat money went up in smoke before the public eye. When Reyes became president other methods were adopted to meet the situation, but little impression was made upon the vast amount of paper in circulation, and for twenty years business was handicapped by insufficient and fluctuating currency.

In 1923 a change began as a result of recommendations made by a financial mission, headed by Professor Edwin W. Kemmerer of Princeton University, which had been asked by the Colombian government to make an economic survey of the country. A new system of banking was introduced and the currency was reformed—changes made easier by the fact that in 1922 the $25,000,000 indemnity due from the United States began to be paid in annual installments of $5,000,000. As a result of reorganization and a new financial policy, currency was stabilized on a gold basis within the next two or three years, business confidence was restored, and the nation's foreign credit became sound.

For nearly a century Colombia's population was supported almost wholly from the exploitation or production of raw materials. During much of this period economic activities were handicapped by revolutionary disorders or civil wars. Labor engaged in peaceful employment was conscripted by one side or the other, herds of live stock were driven off to mount or feed armies, and crops and cargoes were destroyed or seized by the enemy. Nevertheless the various industries continued in a fluctuating way, and new ones developed. Gold, silver, platinum, and emeralds were still taken from mines in the interior. Pearls were gathered along the coasts. The value of forest products—cabinet woods and dyewoods, ivory nuts, rubber, and medicinal herbs—was considerable. During the middle of the nineteenth century cinchona bark was one of the leading exports, and in 1875 cinchona valued at about $10,000,000 was sent out, but soon afterwards there was a sharp decline, due to competition from the cultivated product coming from the East Indies. As the forests were thinned out or cleared away, cattle-raising expanded in the rougher parts of the country; and even more remarkable development was made in agriculture. The varied climate permitted the growth of a diversity of plants. Coffee, introduced about the beginning of independence and produced in the uplands, was for most of the past century the leading crop of the country, and with the establishment of peace and order in the twentieth century it increased greatly. In 1910 the amount exported was valued at a little over $18,000,000; in 1924 it exceeded $53,630,000. A serious rival had already appeared,—the banana,—grown in the humid lowlands, largely by American capitalists. In 1892 the first important shipment of bananas—171,000 bunches—was made, in 1906 nearly 1,500,000 bunches were sent out, and within twenty years more Colombia had become the second banana-producing country in the world.

The most recent economic development has been in the petroleum industry, which has been largely in the hands of British and American capitalists. One of the first fields to be exploited was in Santander, where in 1925 the Tropical Oil Company was pumping out 20,000 barrels of petroleum a day and was planning to send it to the coast by extensive pipe lines then in construction. Other important wells with growing outputs were found on the northern Pacific coast. The total oil production of the country in 1928 was 19,900,000 barrels.

The manufactures of Colombia have been very meager; but, encouraged by high protective tariffs during the World War, a marked growth began, largely in clothing and leather goods.

As in most of the other Latin-American countries, economic development has been handicapped in Colombia by the lack of adequate transportation facilities; and the problem of supplying the need has been unusually great there owing to the depth and ruggedness of the hinterland and the fact that good, navigable streams are lacking. The Magdalena, with its long tributaries, appears on the map to furnish a natural highway for the interior of the country, but the river is shallow and treacherous, and during most of the year the water trip between the coast and the short railroad connecting with Bogotá is certain to take eight or nine days, and may take a month if the flat-bottomed steamboat used for navigation gets firmly stuck on a sand bar.

As has already been stated, the Panama line, opened in 1855, was the first railroad in Colombia. Other roads were slowly built, all of them short and most of them in the Magdalena valley, where they served as feeders to the boat lines on the river; by 1906 the lines totaled less than four hundred miles. By 1925 they had not yet reached nine hundred miles, and represented some twenty different roads of varying gauges, some of them government-owned, others belonging to foreign companies. After the turn of the century, owing to fear of economic domination from abroad, there was a strong move toward government purchase of lines. The La Dorada Railroad, built by an English company, carries passengers and freight over an important route twenty-two miles long around the falls of the Magdalena, to connect with the steamboats on the upper part of the river. From Girardot, on the Upper Magdalena, extends a line which in 1910 was united with another road, of different gauge, running out from Bogotá; thus the capital was finally connected by rail and boat with the outside world. A considerable portion of the Panama indemnity money has been devoted to railroad construction, and various lines intended to unite the capital with the coast are under construction. By 1928 about fifteen hundred miles of road were in operation.

The need for rapid transportation for mail, passengers, and valuable freight of small bulk began to be supplied some years ago by a German company, the Sociedad Colombo-Alemana de Transportes Aéreos, commonly referred to from its initials as "Scadta." This was organized in 1919, and in 1920 it started airplanes over the first regular routes. By the close of 1928 several airplane lines had been established, the most important being that from Barranquilla, near the mouth of the Magdalena, to Bogotá, about seven hundred miles to the south.

Since independence the population of Colombia has multiplied perhaps four or five times; in 1928 it was estimated at 7,282,000. The growth has been largely through natural increase, as few foreigners have settled in the country. Perhaps less than 10 per cent of the whole is of pure white blood, but this element forms the governing class. More than half the population are mestizos, from 10 to 15 per cent are aborigines, and the remaining 30 to 35 per cent are of pure or mixed Negro blood. The whites for the most part live in the cooler highlands, as do many of the mestizos; but both the latter and the aborigines are numerous in the plains of the larger river basins and also in the remote, steep-walled valleys, whither they have fled to escape conscription into the army. The Negro element is largely restricted to the humid coast.

The extreme isolation of the white population and the more Hispanized mixed element gave the nation a cloistered psychology, which modern inventions such as the airplane, the radio, and the motion picture are only now beginning to remove; yet there is much difference in the popular characteristics of various portions of the country owing to local geographic influence upon various Spanish types. The most distinctive Colombian element is to be found in the department of Antioquia. They differ greatly from the rather light-hearted, easy-going people of the Bogotá section, for they are decidedly more serious, energetic, self-assertive, and industrious than the latter. This is attributed partly to the rather stimulating climate and the infertile soil and partly to a strong Basque strain and a lesser Jewish one, early included in the population.

Owing to geographical handicaps, but more to revolution and civil war and to conservative religious influence, Colombia is very backward educationally. Nearly all the good work done in the early national period toward establishing schools was wiped out by the devastating wars of the Liberal régime. As late as 1900 the estimated illiteracy of the country was 90 per cent. Since that time there has been some improvement, but still the great majority of the inhabitants can neither read nor write. Núñez, it will be recalled, virtually placed popular education in charge of the Roman Church; and that church has controlled it ever since. The result has been to retard the modernization of the school system. However, some of the progressive Conservative presidents of the last quarter of a century introduced improvements. Rafael Reyes had normal schools started; and Carlos Restrepo, who was rector of the University of Antioquia before he became president, created an inspector-generalship of education and worked to stimulate interest in secondary and higher education, as well as to secure greater national control for the schools. In 1924 the government invited a German educational commission to the country to aid in reorganization of the schools, and some improvements resulted. A survey of the secondary institutions in that year revealed the fact that they enrolled only a little more than seventeen thousand pupils. These were all boys, for, owing to the influence of the Colombian Roman clergy, who had stood out against the higher education of women, no public secondary schools for girls existed in the country. None had been established three years later. So cloistered was the psychology of the nation that it would have been considered a scandal for girls to attend the public high schools established for boys. Since there were no schools to prepare them for higher education, there were no women in any of the five universities of the country. After completing the primary grades they were admitted to the normal schools in order to prepare for primary-school teaching, but the general education thus afforded was very meager. In 1927 the Colombian educational institution offering the most advanced training for women was a private school in Barranquilla conducted by American missionaries. This had eleven years of instruction, including the kindergarten.

PANAMA

Panama, although recognized as a sovereign and independent nation, is also a permanent protectorate of the United States of America, which not only undertook by the Hay-Bunau-Varilla Treaty to preserve the independence of the little republic but was also given control of sanitation in its two most important cities, Panama, the capital, and Colón, just opposite, on the Caribbean.

The constitution adopted by Panama early in 1904 provided for a highly centralized government, in harmony with recent Colombian history. The governors of the provinces were appointed by the president of the country and were responsible to him alone; but an amendment of 1917 gave the provinces the right to select their own governors by popular vote. The president is elected for four years, the congress is unicameral, and there is a graded system of courts.

As in the case of Cuba under the Platt Amendment, the American government has sought to prevent revolutions and other political irregularities in Panama. In 1908 a warning was issued from Washington in anticipation of election frauds, and United States troops were landed in 1917 and again in 1918 because of political disturbances.

When Colombia recognized the independence of her lost department, a boundary line laid down for Panama as a state in 1855 was agreed upon between the two; but adjustment of the boundary dispute with Costa Rica was not such an easy matter. While Panama was still a part of Colombia the boundary difficulty was submitted to the president of France for arbitration. An award was rendered by President Loubet in 1900, giving to Costa Rica territory on both oceans claimed by Colombia. With the aim of demarcating the line, negotiations were under way between the two countries when Panama revolted and became independent. Later Panama refused to accept the Loubet decision; but by treaty with Costa Rica in 1910 she agreed to submit the question to the Chief Justice of the Supreme Court of the United States. In 1914 Chief Justice White reported in favor of Costa Rica's contentions, but Panama again refused to accept. After that the question remained in abeyance for a few years until a clash was threatened between nationals of the two countries in the Coto district, over which feeling was strongest. This brought a sharp note from the United States informing Panama that the White award must be accepted; Panama replied by asking to have the question referred to the Hague Tribunal. In 1921, however, upon the insistence of the American government, Panama evacuated the Coto district, and it was promptly occupied by Costa Rica; thereupon Panama broke off diplomatic relations with Costa Rica and they were not resumed for some years.

Meanwhile dissatisfaction had been growing in Panama over matters connected with the Panama Canal, which was opened to traffic in 1915. A chronic grievance was the existence of commercial establishments in the Canal Zone hurtful to the business of merchants in Panama. In the discussions that developed in this and other connections the fact was brought out that the United States considered sovereignty over the Zone to have been granted to it by the Hay-Bunau-Varilla Treaty. Panama denied this, but no decision was reached over the matter. In a treaty signed between the two countries in 1926 the United States agreed not to permit the commercial competition complained of by the Panaman government. However, some other clauses of the treaty greatly increased the disaffection of the Panamans instead of diminishing it; for the little republic was asked to "consider herself in a state of war in case of any war in which the United States should be a belligerent" and to permit the use of her soil for military maneuvers in time of peace.

The object of the provisions was to insure the protection of the canal in time of war; but the Panamans felt that the agreement would make their country virtually a possession of the

United States in time of war and a definite military protectorate during peace. Hence they resented the treaty, and in this they had the sympathy of the rest of Latin America. The Panama assembly virtually rejected the treaty early in 1927 by failing to ratify it and by asking for further negotiations. Later the Panaman minister of foreign relations declared that his government would not acquiesce in the agreement unless it was changed. Negotiations had not been reopened over the matter, and the treaty had not been ratified by Panama, by the spring of 1930.

For a time after the negotiation of the unpopular treaty, active hostility toward the United States was shown in Panama by an attempted boycott of American goods. A virtual appeal by the Panaman delegate to the assembly of the League of Nations for intervention to determine the question of sovereignty over the Canal Zone also caused a flurry of excitement, particularly in League circles; but the League failed to act, and the president of Panama disavowed the appeal.

As was to be expected, to have the world's greatest highway bisecting its territory transformed Panama in many ways. In 1903 the population numbered perhaps three hundred thousand and was made up of the three races existing in Colombia, in about the same proportions as there. Most of the white element is found in or near the cities along the Canal Zone, and the several thousands of wild aborigines live in the little-explored jungles to the east and west. In the former is the San Blas region, the home of the so-called "white" Indians. In 1929 the country, exclusive of the Canal Zone, had an estimated population of about half a million, the increase being largely brought about through the growth of Colón and Panama City by contributions from many foreign nationalities. The proportion of whites had increased; but to the business element in the cities had been added many Oriental merchants who catered to the large transient population.

Though the country still shows lack of scientific methods, agriculture has expanded greatly under government encouragement, especially the cultivation of sugar and of bananas, the most important crop. The building of additional railroads, as well as of highways and supplementary vehicular roads, has done much toward stimulating agriculture and also commerce. The commerce is carried on largely with the United States. The exports are chiefly tropical fruits,—mostly bananas,—forest products, tortoise-shell, and pearls.

Educationally, Panama is ahead of Colombia. Soon after independence was secured in 1903 a public-school system was established and a serious effort was made to supply educational facilities and to see that the children made use of them. Coeducation exists throughout the school system. In 1927 there were almost sixty-three thousand children enrolled in the public primary and secondary schools, and many more were in private institutions. Hence illiteracy was being rapidly reduced. Professional training was supplied by normal schools and by the National Institute.

XXII

VENEZUELA

But how, after having broken all the chains of our former oppression, could we accomplish the marvelous task of preventing the remnants of our fetters from being turned into liberticide weapons? The relics of Spanish domination will last a long time before we succeed in annihilating them.

From the address of Simón Bolívar at the Congress of Angostura

WHILE Colombia was studying the science of politics in the hard school of experience, Venezuela was likewise pursuing a troubled course. It would be impossible to say which country has had the more turbulent career: though the former has been especially afflicted with ruinous wars, the latter has suffered more from revolts and revolutions.

Venezuela probably made a better start than its neighbor, by adopting a more moderate, tolerant policy. The constitution proclaimed in 1830, a few months after secession from Great Colombia, sought a mean between centralism and federalism, yet somewhat favored the former. By restricted suffrage José Antonio Páez was elected president for four years. At first the government was at Valencia, where independence had been proclaimed, but shortly after Páez's election congress voted the removal of the capital to Caracas. One of the first acts of the president was to lead an army to put down a revolt in favor of reuniting Venezuela with New Granada. When he had restored order he saved later trouble for himself by granting amnesty to the vanquished.

In its attitude toward the Church the new government also showed willingness to compromise. Laws were passed granting religious freedom and abolishing tithes, but Roman Catholicism was left the state religion, with support from the public treasury. Though later governments were distinctly unfriendly toward the Church, there was no such persistent harshness as was displayed toward it under the Liberal régime in Colombia. Hence the Church did not, through fanatical reaction, become violently dominant in Venezuelan politics.

The Páez government likewise took an enlightened attitude toward the economic development of the country by abolishing the ancient monopoly on tobacco and passing new tariff regulations for the stimulation of trade; but there was no such interest in fostering popular education as was displayed by Colombia in this period.

Inasmuch as no presidential candidate secured a majority of votes in the next election, congress, as provided by the constitution, made the decision; to the great disgust of the military element it named José M. Vargas, the distinguished and highly respected rector of the university. The new president accepted the office very reluctantly. He began a wise and benevolent rule, but it was rudely interrupted in a few months by a revolt of the military faction. The chief executive was arrested by one of the leading conspirators, who, according to tradition, declared, "Dr. Vargas, the world is for the strong and brave"; whereupon with serene dignity José Vargas replied, "The world is for the *just*." He was forced into exile, and the vice president finally completed his term. The revolt was put down through the strenuous efforts of Páez, commander in chief of the government troops. Páez appears, however, to have been for some time uncertain which side to support, for the rough soldier saw little of worth in the learned Dr. Vargas.

In recognition of these services congress voted Páez the title "Illustrious Citizen," and in 1838 he was again elected president. He succeeded in maintaining order, and thus definite progress was made possible. Militarism seemed to be on the wane; the Páez government reduced the army and used the money thus saved for building cart roads between the interior and the coast. A national bank was founded, a number of new commercial treaties were formed, and arrangements were made for refunding the national debt. Immigration was encouraged, and a colony of Germans was settled on lands granted them in the Aragua valley, thus adding to the industrious element in the nation. Largely as a result of Páez's policy, Venezuela's foreign trade increased in value 300 per cent during the first decade of independence. His administration also made a treaty with England for the abolition of the African slave trade, it undertook the work of civilizing the aborigines by arranging for a mission of friars in the province of Guiana, and to some extent it encouraged and aided education.

The tolerance of the Páez oligarchy was further shown by the passage of a law granting freedom of the press, but providing punishment for the abuse of this freedom. Assured by the law, the energetic Antonio Leocadio Guzmán founded *El Venezolano*, a journal that systematically attacked the Conservative dominant faction and urged the cause of the growing opposition, which called itself the Liberal party. That the old political divisions of ten years before, which developed over opposition to Bolívar, had ended was apparent from the fact that in 1842 the body of the Liberator was, by the initiative of Páez, brought from Santa Marta and entombed in Caracas with the most distinguished national honors. The political division fostered by *El Venezolano* meant new alignments.

Under Páez's successor, Carlos Sublette, the same general policy of progressiveness was continued, and with the exception of one insurrection the term was peaceful. Special attention was paid to improving transportation and in other ways fostering commerce, and thereby the national revenue was increased. Before the end of Sublette's administration the public debt was reduced to one fourth of what it was when Venezuela became independent.

Trouble was brewing, however, and it came soon after the election of Sublette's successor, José Tadeo Monagas, a member of a very numerous and powerful family. Monagas, known before election as an Oligarchist Conservative, was backed by Páez; but to the deep disgust of the latter and many others of the dominant party, the new president, like his contemporary Mosquera of New Granada, soon showed himself strongly influenced by the revolutionary spirit in Europe. His facing about was very apparent from his treatment of the editor of *El Vene-*

zolano, his opponent in the election. The attacks of Guzmán upon the government had been so bitter during the campaign that he had been condemned to death just before Sublette went out of office. Monagas commuted the sentence to "perpetual" exile; but two years later Guzmán, having been elected vice president, was back in Venezuela coöperating with Monagas.[1] This was keenly resented by the Conservative element in congress, which, however, was more roused by the fact that Monagas appointed Liberals to some cabinet positions. Impeachment of the executive was threatened. To prevent this Monagas dissolved congress by means of the army. The disillusioned Páez now took up arms against his former candidate, but he was defeated and driven into exile. Monagas's high-handed action toward congress may be taken as marking the beginning of serious dominance of the government by the executive and the start toward absolute dictatorship for Venezuela.

Monagas was followed in office by his brother, José Gregório Monagas, on the whole a mild, well-meaning man; but his administration was much disordered, for both the Páez faction and the Guzmán faction were against him. One outstandingly worthy measure, however, was passed under his influence—the abolition of slavery. In a stirring message to congress José Gregorio recalled Bolívar's ardent wish that the slaves should be free, and in 1854 he secured the passage of a law making effective an existing treaty with England against the African slave trade and freeing the slaves in the country, with compensation to the owners.

Since by 1855 the leaders of both main factions were heartily tired of political turbulence, they agreed to support José Tadeo Monagas for the presidency in the hope of peace and order. He was elected, but he again disappointed many of his supporters, for he had developed dictatorial ambitions. He conducted himself in a high-handed manner and had a congress that he controlled draw up a greatly centralized constitution extending the presidential term to six years, with no prohibition against reelection. A coalition having the motto "Union of parties and forgetfulness of the past" was formed against the tyrannical president, and he was forced to resign in March, 1858. With him was eliminated his constitution. The Venezuelan people were not yet resigned to dictatorial rule.

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[1] The constitution provided for a four-year term for president, but only a two-year one for vice president.

In the hope of guarding against the evils of the past, the provisional government that was formed called a convention made up of members from both parties to draw up a new constitution. In the gathering were ardent champions of centralism and of federalism, the Conservatives usually being the former and the Liberals the latter. The resultant frame of government, promulgated late in 1858, showed a move toward decentralization, giving more power to the municipalities than the constitution of 1830, and it made a gesture against oligarchy by granting manhood suffrage. Yet the federalist Liberals were not satisfied: they wanted a completely federalized government. Hence the country was soon engaged in a wild civil war over the constitution which was intended to end revolution and domestic conflict. The aged Páez, an exile in the United States, now decided that his hour had again struck. He returned to his country in 1861, secured control, cast aside the offending constitution, and established himself as dictator. But fighting went on for two years more. At the end of it Páez, by previous arrangement, resigned his authority to a bipartisan national assembly, the members of which he had helped to name, and soon afterwards again retired to the United States, where he spent the remainder of his days. His devotion to his country was deep, and he hoped by exile to bring it peace; but peace was long delayed.

The national assembly called a new constituent convention. In this convention the federalist faction was dominant; consequently the constitution which it finished in 1864 created the "United States of Venezuela" and reduced the government to a confederation. This arrangement was no more conducive to political peace than its predecessors; in fact, the situation grew worse, and for some years the country was torn by revolution and civil war.

Gradually, however, above the turmoil and confusion caused by numerous ambitious leaders one figure began to loom large. This was Antonio Guzmán Blanco, son of the founder of *El Venezolano.* By 1872 he had pacified the country and established himself as dictator, a position that he held directly or indirectly for nearly twenty years in spite of repeated insurrectionary movements against him. The new ruler was a dashing, brilliant, energetic man, experienced in military leadership, diplomacy, and politics. He was fond of traveling and of dealing directly with foreign governments, and he liked administrative politics; hence he had a new constitution drawn up which reduced the presidential term from four years to two and prohibited immediate reëlection. He usually spent the alternate terms in Europe, leaving a puppet president of his choice in charge of the government. This apparently self-effacing arrangement was probably made partly to prolong his tenure of control by preventing the development of destructive jealousy; for Guzmán Blanco was a shrewd political psychologist who knew well how to mollify the powerful and win the adulation of the humble. Perhaps it was more policy than vanity that caused him to develop a cult in connection with himself. Thus, one of the national literary contests had for its theme "La Gloria de Guzmán Blanco," and eight hundred judges were appointed to read the prose essays setting forth the great achievements of the dictator and award the prizes. He also had every bridge and public building that was constructed during his régime marked with a tablet giving himself credit for the work; and in the capital alone fifteen statues were erected through his instrumentality to that "Illustrious American, Guzmán Blanco."

The dictator really deserved some of the praise that he stimulated for himself, for his was a generally benevolent despotism. He and his associates brought unparalleled progress to Venezuela, and peace such as it had not known for more than twenty years before his political day. Well-nigh every branch of the administration was overhauled and its work expanded and made more efficient. The new government found the finances in bad shape; to increase national income by improving trade, it abolished export duties and reduced those on imports, but it adjusted the latter with the aim of protecting Venezuelan products. It reorganized the public debt, restored the public credit, and decreed a new coinage minted in France. Guzmán Blanco secured some of the needed funds by forced loans from his enemies.

Extensive building plans were made and carried out under the new régime. The streets of the capital were widened and paved, parks were laid out and ornamented otherwise than with the dictator's statues, and many needed public buildings were erected. Telegraph lines were extended and wagon roads and railroads were built. The first rail line in the country was the Bolívar Railroad, begun in 1873 to connect Tucacas with the copper-mining town of Aroa. Other lines were begun soon after, and most of them were completed. One of them joined Caracas with the port of La Guaira, and another connected Puerto Bello with Valencia. By the close of the Guzmán Blanco régime the country had the nucleus of a railway system.

The dictator to some extent fostered primary and secondary education, but he and his lieutenants were perhaps no more interested in wiping out illiteracy than was Díaz of Mexico. He did, however, aid professional education by reforming the University of Caracas and establishing a school of engineering. To some extent he also encouraged art and letters.

Guzmán Blanco, who was a Grand Master of the Masonic order, dealt a hard blow to the Roman Church in Venezuela by stripping it of much of its power. He legalized civil marriage and placed the registration of births and deaths under civil control; he encouraged and protected Protestant missionaries; and he suppressed the monastic orders and confiscated their property, setting aside one of their most beautiful churches as a pantheon, to which the remains of Bolívar were removed from the cathedral. He also expelled from the country the archbishop and the papal nuncio who had strongly sympathized with the prelate's refusal in 1876, to order a Te Deum sung to celebrate recent victories of the dictator over his Conservative foes. For a time after the expulsion he even planned to cut off Venezuela entirely from Rome and to establish a national church with an archbishop elected by congress and with priests chosen by their parishioners. A measure with these changes in view was introduced into congress, but it was finally dropped.

Despite his notable achievements and the fulsome praise that he had received, Guzmán Blanco's popularity was well on the wane by 1888 and the strength of the opposition had increased accordingly. One night in October of that year the crowds in the streets made their feelings clear beyond question by ripping from the public buildings of Caracas the tablets bearing the dictator's name and throwing down the statues that he had had erected to himself. Guzmán Blanco, who was at the time in Europe with a substitute in the presidential chair, wisely heeded the broad hint by giving up all further attempt to control Venezuelan politics and settled down in Paris.

A period of disorder followed his withdrawal, with rapid changes in executives and much stealing of public money by the politicians in control. Then came a short interval of peace and order through a successful "Legalist" revolution led by Joaquín Crespo, who had been Guzmán Blanco's most able alternate. The victors drew up a constitution, which was adopted in 1893. It extended the presidential term to four years, provided for election by secret ballot, and included various guaranties for the safety of property of foreigners as well as of Venezuelans. Crespo was elected under the new basic law and went into office in March, 1894. He proved conscientious as well as efficient, and did much toward repairing the damages done during the past six years of disorder; but for a time his attention was largely taken up with a long-standing dispute with England over the boundary between Venezuela and British Guiana, which suddenly became very serious.

England had steadily refused to submit the question to arbitration, and in consequence Venezuela had severed diplomatic relations in 1887. They were still severed in 1895, when a crisis was precipitated by the arrest in the disputed area of two British Guiana police officers by Venezuelan authorities. The men were soon released, but the Crespo government appealed to the

United States for aid against the encroaching British. The American government, which had repeatedly tried by mild measures to bring about an adjustment, with no results, now took a more emphatic stand. Secretary of State Olney again urged arbitration, citing the Monroe Doctrine; when the British government failed to yield, President Cleveland turned to Congress and asked that money be voted for a commission that should try to determine the just boundary. Probably influenced by trouble developing in South Africa, the British government gave way and consented to arbitrate, but with the understanding that fifty years of possession should be regarded as giving title to land. A special arbitral board made a careful investigation and in 1897 awarded most of the disputed territory to Great Britain.

Shortly after Crespo's term ended came three successive revolts against his successor. The last, led by Cipriano Castro, a brutal and generally unscrupulous adventurer, was successful, and Castro entered Caracas with his victorious motley army late in 1899. For the next nine years he was virtually dictator of Venezuela. Evidently aiming to emulate Guzmán Blanco, he gave much attention to the material development of the country. He erected public buildings, greatly extended the telegraph lines, and built wagon roads to supplement the rail lines, which Crespo had extended considerably.

Castro was cruel, vindictive, and extravagant, and there were repeated insurrections against him. During these the property of foreigners in Venezuela was destroyed; and as a result the dictator got into trouble with their governments, for he showed a reluctance to recognize claims for damages as well as to pay them. Failing to get redress for their subjects by diplomatic methods, the governments of Germany, Italy, and Great Britain in 1902 blockaded the two chief ports of Venezuela. When the blockade grew increasingly coercive, Castro protested vigorously, and President Roosevelt emphatically urged the claimant nations to submit the matter to arbitration. They agreed; and after some further discussion all foreign claims against Venezuela were referred to ten mixed commissions which sat at

Caracas to decide on the amount of money justly due in each case. All the claims were shown to be exorbitant, the most extreme being those of German, Italian, and United States nationals. Of these three the most unreasonable were the last-named; the demand was for 81,410,952 bolívars, of which the commission allowed 2,313,711. The contrast between the claims made and the amounts allowed helps to explain why weak little states are often unwilling to pay bills of the sort on mere demand.

Castro later showed a reluctance to pay some of the sums agreed upon as just, and, furthermore, he treated the representatives of various foreign governments with rude arbitrariness. The most serious difficulty came through the dismissal of the minister from the Netherlands after charges that political refugees from Venezuela were being harbored in the neighboring Dutch island of Curaçao. The Netherlands responded by sending gunboats that destroyed the Venezuelan fleet and blockaded the harbors of the country. Late in 1908 Castro departed for Europe, leaving affairs in the hands of his first vice president, Juan Vicente Gómez. The ostensible reason for his going was the need for surgical attention, but he evidently had come strongly to suspect that his political course was run. Shortly after he departed congress voted to suspend him from office and let Gómez assume the authority. When Castro protested, congress accused him of misconduct in office and voted confidence in Gómez, who in December, 1909, after he had put down disorders in the country, was proclaimed provisional president.

The fact that Gómez promptly informed foreign governments that he desired their good will and intended to meet all financial obligations did much to strengthen his position at home as well as abroad; hence in 1910 he was elected president for four years under a new constitution drawn up the year before to displace one promulgated by Castro. Castro did not remain nonresistant, however, and in 1913 a serious revolt broke out in his behalf; but Gómez himself took to the field and crushed the uprising.

This apparently stimulated Gómez's self-confidence and ambition, for the next year a constitution was adopted that plainly paved the way for a "constitutional dictatorship." It provided for a president to be elected for a term of seven years, with no provision against immediate reëlection, and gave him extreme powers, including the right to name his own substitute. In 1922 another constitution was adopted—the fourteenth that Venezuela has had, counting those of Great Colombia. This one closely followed that of 1914, except for two or three changes enabling Gómez to suit his convenience and inclinations more in the exercise of dictatorial power; for though Venezuela is nominally a federal republic with states exercising a considerable degree of local autonomy, actually there is little more of republican control in the country than there was in Russia under the last of the Czars. During the past twenty years Juan Vicente Gómez's will has been law to even a greater degree, perhaps, than in the case of the dictators who preceded him. Until 1922 he usually acted through the provisional president while he himself was head of the army, for he evidently decided that this was the most secure position in the country. In that year, however, he assumed direct charge of the presidential office and retained it until 1929, when he refused to continue in it, though he was reëlected; but he consented to become generalissimo of the army, which was an ostensible withdrawal from political control with the undoubted intention of retaining it indirectly. This move was evidently made because of the growing restlessness on the part of the nation and because of the serious revolts that broke out in 1928. Nevertheless the attempts against the government continued.

Under Gómez's twenty years of rule, as under the despots who preceded him, freedom of speech and of the press were quite absent: nothing resembling criticism of the dictator was permitted, and all opposition was severely punished;[1] but in the minds of many these restrictions were more than compensated for by the fact that Gómez brought comparative peace to the country in its external as well as its domestic relations, made safe the lives and property of all who did not oppose him, and fostered the economic development of the country. He kept his pledge with reference to money owed to foreigners, and in general sought to win the good will of other nations. Alien capitalists were encouraged by liberal concessions to invest in the country.

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[1] These two incidents, which came to the attention of the writer during a visit to Venezuela in 1927, illustrate the methods of control followed by Gómez. A physician was warned to leave the country, and did so, because he wrote for a Caracas paper a letter criticizing sanitary conditions in the city. An editor of a newspaper was imprisoned for five years because in a recent presidential "election" year he published a picture of a prominent countryman with a note under it to the effect that the man in question would be good presidential timber.

Though lacking in book knowledge and virtually illiterate, Gómez had practical common sense, and this helped him to realize the needs of the country and to select fairly able men as assistants. One of his most persistent aims was to get the nation to work and produce; and with the object of expanding the market for Venezuelan products he proceeded to make the country better known by extending its diplomatic and consular service. To make it easier to bring commodities to market, motor highways were begun, and by 1924 almost two thousand miles of road had been made ready for service and over a thousand more had been projected. The two most important lines under construction are the Great Western Highway, connecting Caracas with the Colombian frontier, and the Great Eastern Highway, running from the capital to Ciudad Bolívar on the Orinoco.

Under the Gómez dictatorship certain economic activities developed and expanded and others languished. Forest products dwindled, as did also cattle-raising, which had been long falling off, though the grassy llanos were not put to other uses. It was estimated that there were but one fourth as many cattle in the country in 1921 as in 1883. During recent years the value of Venezuelan cattle and cattle products has fluctuated between two and four million dollars. The mining of gold and copper continues, though on a small scale. The extraction of asphalt is a rather new industry. The only important known supply of this mineral in Venezuela is in Bermúdez pitch lake on the northeast coast. The extraction of petroleum, which began on a large scale in 1923, is by far the leading mining industry.

About 12,000,000 barrels of oil were taken out in 1924, about 64,400,000 barrels in 1927, and about 106,000,000 barrels in 1928, placing Venezuela next to the United States in the production of oil. Much American and European capital is invested in the petroleum lands, which lie in the region of Lake Maracaibo. The most important agricultural products are sugar, cacao, and coffee; of these the coffee, which is of a superior quality, leads in value. With increased facilities for getting the crops to the ports for shipping, planting in general has tended to increase. Under stimulating tariffs various manufacturing industries have begun on a modest scale. In view of the size of the country commerce has been unimportant, but it has shown considerable growth during the past few years. The leading exports are coffee, cacao, sugar, and petroleum. The total value of exports in 1927 was a little less than $86,000,000.

The growth in Venezuelan population has been slow. The country suffered more than any other in the wars for independence, and is estimated to have lost about a third of its inhabitants, who may have numbered nearly a million when the struggle began. There was some increase from the outside due to the continuation of the African slave trade on rather a large scale until 1854, but there has been little immigration from Europe. The estimated population in 1928 was about three million. Perhaps less than 10 per cent of these are pure whites, about 20 per cent are Negroes and aborigines, and a large part of the remainder are mixtures of all three races.

From the standpoint of literacy Venezuela is one of the most backward of the Latin-American countries, for very little attention was paid to public education until the accession of Gómez. In 1908 there were but 35,777 pupils enrolled in the public schools. There were, however, some thousands in conventual and parochial institutions; for the Roman Church, which regained some of its power after the elimination of Guzmán Blanco, discouraged public schools and sought to control the minds of youth through training them in schools of its own. Public schools were increased, however, as more funds for the purpose became available, and in 1925 the minister of public instruction reported 352,337 children in the public primary schools, 9203 in the secondary schools, and 4304 in the normal schools. Professional education has long been available through the Central University at Caracas and the University of the Andes at Mérida, but during recent years commercial and trade schools have been added. Within the last ten years preparatory-school training has been offered for girls, and a few of them have enrolled in the university in Caracas. In the large cities are public libraries, the most important being the National Library in the capital, with about fifty thousand volumes.

XXIII

ECUADOR

ECUADOR, the colonial Quito, the smallest and weakest of the states formed from the disunion of Great Colombia, was the most unfortunate of the three in its start as an independent nation. Juan José Flores, who led in its secession and was for about fifteen years the dominating political influence, was more of a military adventurer and less of a statesman than either Santander, who shaped the early career of New Granada, or Páez, who played a similar part in Venezuela. The militaristic reaction characterizing Flores's policy set low standards for the country and helped to give Ecuador an even more turbulent history than its two former companions in political union.

The status of the Roman Church was perhaps the most general cause for strife; but many of the almost countless revolts and revolutions appear to have been prompted by mere selfish caudilloism, encouraged by the physiographic partition of the country. The coast was usually aligned against the highlands, and repeatedly rebels seized Guayaquil and held it against the authorities at Quito, the capital.

At the call of Flores, who was made provisional president by a Quito junta immediately after secession, a constituent congress met at Riobamba and formed for the "state of Ecuador" a constitution that was proclaimed in September, 1830. Following the Cúcuta constitution of Great Colombia, it provided for a conservative centralized government giving considerable power to the president, who was to be elected by a unicameral congress for a term of four years. Roman Catholicism was to be the religion of the land to the exclusion of all others. Flores was made first constitutional president. His term foretold the future, for there were various uprisings; the first of these took place almost at once at Guayaquil, in favor of reunion with New

Granada under Simón Bolívar. It threatened to be serious, but when word came of the Liberator's death the opposition to independence quickly died down.

Two events of importance from a territorial standpoint took place in 1832: the Galápagos Islands were permanently occupied by Ecuador, and the boundary line on the northwestern frontier of the country was settled. The islands, which had been discovered during the colonial era but not permanently occupied, were quietly appropriated through the establishment of a colony, named Floreana for the president. Soon afterwards it became a penal settlement for unwanted politicians. The adjustment of the frontier line with New Granada was not so easily effected. Much of the region in dispute (the southern part of the Cauca valley) had formed part of the presidency of Quito under Spain, and three of the leading towns—Pasto, Popayán, and Buenaventura—had sent deputies to the constituent congress at Riobamba. Flores, fairly sure of the outcome, desired the question of sovereignty over the region to be settled by a vote of its inhabitants. New Granada was opposed, and armed conflict over the matter began; but a revolt in Quito against Flores caused it to stop abruptly, for the Ecuadorean president set about restoring his authority and appointed an agent to resume negotiations with New Granada. The outcome was unfavorable to Ecuador: New Granada gained the Cauca region, and the Carchi River was agreed upon as the international line from the Andean watershed to the Pacific.

Flores's internal policy, characterized by preference for the military and the Church and by restrictions upon personal liberty, was the cause of much of the opposition which soon developed against him. It was especially strong among the younger men, some of whom formed a society called El Quiteño Libre and began to publish a paper in favor of liberalism. The official champion of the Liberal group was Vicente Rocafuerte, a wealthy congressman of noble birth who had spent some time in England and the United States. When Flores set about banishing his young opponents, Rocafuerte protested, and was himself sent into exile. He soon returned, however, and an insurrection in favor of him as leader broke out in Guayaquil; but Flores crushed the uprising and captured and imprisoned Rocafuerte.

Rocafuerte's supporters were so strong and formidable, however, that the president soon decided that it would be wise to strike a bargain with him. Rocafuerte was willing to compromise; and it was agreed that he was to serve as head of the department of Guayas until Flores's presidential term ended, when he should be "elected" as Flores's successor and Flores should become commander in chief of the army. The conflict was for a time ended and the pact was kept.

After putting down the usual uprisings that followed a change in national authority, one of Rocafuerte's first acts as president was to have a new constitution drawn up. It went into effect in 1835, and by it the country was formally named the Republic of the Equator (in Spanish *Ecuador*). The chief change in the machinery of government was the provision for a two-house congress, made in the interest of greater liberalism. On the whole the new president was tolerant and progressive: he granted amnesty to political exiles; he restored the liberty of the press, which Flores had taken away; and he showed leanings toward religious freedom and the secularization of education. The administration also made efforts to increase immigration, to improve transportation, industry, and commerce, and to save the aborigines from the unjust financial exactions levied upon them by the priests and the local officials.

In 1839, by previous agreement between the two political leaders, Rocafuerte went back to the headship of Guayas while Flores took a turn at the presidency. The four years that followed were notable for complete internal peace (a calm before a storm) and, on the whole, progress in foreign relations. Commercial treaties were made with a few foreign countries, including Mexico and New Granada, and in 1840 Spain was induced to acknowledge Ecuadorean independence. Negotiations that aimed at ending a boundary dispute with Peru proved futile, however, as did an invasion of New Granada made in retaliation for the meddling of the latter in Ecuadorean politics. These two failures, combined with the fact that a flood of counterfeit money was causing the country much annoyance and loss to individuals, roused considerable dissatisfaction with Flores's second administration.

Yet the "father of his country" managed in 1843 to secure the adoption of a new constitution providing for an eight-year presidential term, and got himself reëlected as president. Great was Rocafuerte's indignation over this breach of faith; but he again showed himself as not above compromising with Flores's methods by finally consenting to go into exile in return for a generous pension and the title of "generalissimo." The ambitious president had antagonized large groups, however, and these could not easily be bought off. The Liberals were roused by Flores's apparent intention to secure permanent control, and many of the clergy were estranged by a clause in the new constitution permitting freedom of private worship (a bid for Liberal support). It was the Liberals who, in 1845, revolted and succeeded in ousting Flores from office. Then he, like his erstwhile alternate, was sent into exile with a government pension.

The next fifteen years, with the Liberals in control most of the time, proved the most disorderly period of Ecuador's turbulent history. Foreign relations were troubled by wars with Peru and Colombia, anticlericalism was rampant internally, and the country was demoralized by revolution and wasted by civil strife. One of the few worthy acts of the fleeting governments was the emancipation of about twenty-five hundred Negroes who remained in slavery, with compensation to the owners unless the black was held in bondage in violation of the gradual emancipation law passed in 1821 by Great Colombia.

By 1860 Ecuador had been reduced to anarchy, with caudillo governments set up in different parts. The one in Guayaquil, headed by Guillermo Franco, was perhaps the strongest; but in January of that year it had made a humiliating boundary treaty with Peru, whose vessels were blockading the port. The agreement gave Guayaquil and the province of Azuay to Peru. The situation offered an opportunity to Flores, who had long been in exile—part of the time plotting treasonable filibustering expeditions against his country. With the aim of restoring himself to national favor he joined forces with Gabriel García Moreno, who was trying to oust Franco, and Franco was overthrown in September, 1860. Then Flores and García Moreno together restored the rest of the country to a semblance of order. Flores's political career was ended, however. Now began a Conservative period of fifteen years, dominated by Flores's recent ally, for whom it has been called the Age of García Moreno.

The new leader, who proved extraordinary and even amazing, was born in Guayaquil of aristocratic Castilian parentage and educated at the Central University at Quito. Possessed of an unusually able mind and broad intellectual interests, he read widely, but specialized in law, receiving his degree in 1844, when he was twenty-three years of age. He early became known as a writer and publicist who expressed himself on current questions in clear, energetic prose and satirical verse. Evidently never very favorable to popular government, by a visit to Europe during the revolutions of 1848 he was turned against democracy and was also strengthened in his devotion to the Roman Church. A later sojourn in Europe (especially in France), while he was a political exile during the turbulent eighteen-fifties appears to have added to his political and religious conservatism. After returning from his second visit to Europe he was made mayor of Quito and, somewhat later, rector of the university there. Soon afterwards, like Rafael Núñez more than twenty years later, he founded a political party through which to carry out his ideas of reform. As a fervent member of the new group, known as the National Union, he was elected to the senate. Within that body, he denounced with equal fervor the corruption that riddled the administration and its unconstitutional procedure, and demanded political and financial reform, the suppression of the Masonic lodges, which worked against the Church, and a law providing for public education. When he found his efforts as a legislator futile, he took up arms and, as has been stated, with the aid of Flores got control of the country. One of his first acts after establishing authority in Quito was to have congress declare null and void the treaty made by Franco with Peru.

A few months later García Moreno had a constitution framed according to his ideas of what was needed for the country, and he was made president under it. Like its various predecessors, this supreme law provided for a centralized government; it differed from them chiefly in that it made Roman Catholicism the only religion of the land and made special effort to secure this exclusive position for it. It was, in fact, García Moreno's attitude toward the Church that made him a unique figure in New World political history and even in modern history. Not only was he a devout Catholic, but he felt that the Church must and should be employed to restrain the nation and give it the moral discipline it so badly needed. Rafael Núñez had somewhat the same view, which he may have borrowed from García Moreno; but in carrying out the idea and in his display of devotion to Rome the Ecuadorean quite outdid the Colombian.

Under the recent Liberal régime the Church in Ecuador had been much restricted. In 1862 an agent of the new president negotiated with the Pope a concordat intended to bring about a different state of affairs. By this agreement the Church in Ecuador was given greater privileges than it had enjoyed while the country was a colony of Spain, for papal bulls and other communications from Rome were to be admitted without inspection by civil authorities. Church courts were to have jurisdiction over all cases involving clergy or Church matters; and education was to be placed under the complete control of the clergy, who were also to have censorship over all publications.

While he was launching his reactionary religious program García Moreno was also doing much to further the economic and material progress of the country. Scrupulously honest himself, he did his utmost to eliminate corruption in the government and to secure efficient and economical financial administration. He donated his own salary to charity. To encourage commerce, he provided a uniform currency by establishing a mint; he improved some of the ports and began the construction of a wagon road from Quito to the coast, between which traveling was at the time done only by saddle; and he tried to stimulate the extension and improvement of agriculture and to add to the variety of farm products. For the aid of dwellers in unforested regions he introduced the eucalyptus tree. Under his efforts the economic occupations of the country took on new life; but there was an obstacle to commerce which García Moreno was unable to remove—the fact that yellow fever was practically endemic in Guayaquil, the country's best port, and therefore vessels tended to pass it by.

As president, García Moreno easily secured a law providing for a public-school system, but instruction in the schools was divided up between the religious orders. The education of boys was intrusted especially to the Jesuits; the girls, who received much less schooling, were placed in charge of nuns. Throughout the schools much stress was placed upon Church history and religious instruction.

Despite his best efforts the dictator was unable to bring complete peace to the country, for his Liberal enemies were resentful and active, even across the line in New Granada, where Mosquera's aid to Ecuadoreans of his political school led to war between the two countries. The repeated insurrections that took place against the administration were partly inspired by the desire of military chieftains to gain control for merely selfish ends, but they were influenced too by García Moreno's own acts. His treaty with the Vatican was naturally much resented by the Liberals; but his despotic methods, which grew more tyrannical as opposition increased, stirred up more feeling. Those who were against him, or whom he suspected of being against him, he imprisoned, exiled to foreign lands or to the Napo wilderness of the country's Amazon territory, or promptly executed by shooting.

The fact of the matter was that García Moreno was finding governing Ecuador a more difficult task than he realized when as senator he denounced unconstitutional practices and demanded reforms. It is stated by a contemporary that when a bishop pointed out to the dictator that the execution of an opponent which he planned was unconstitutional he replied that since he could not save the country from anarchy by trying to govern according to the constitution, he was governing according to his own views of right and public necessity. That he was fervently conscientious in the matter there is no doubt; but the constitution again became a dead letter, and his enemies grew in number.

At the end of García Moreno's four-year term another took his place, and he went abroad on diplomatic missions. The new president quarreled with congress and in 1867 resigned his office. The man elected to fill the vacancy proved vacillating in the face of new insurrections and of an increased demoralization resulting from a terrible earthquake that wrecked Quito and other towns and killed thousands. Hence in January, 1869, García Moreno again took control.

By this time he had reached the conclusion that he himself could best rule the country, and he planned for a permanent dictatorship; accordingly he had a new constitution drawn up giving greatly increased powers to the president, whose term was now extended to six years, with no prohibition against immediate reëlection. In June, 1869, he was elected to the enlarged office. His second term was, on the whole, more orderly than the first (partly because he reorganized the army and improved its discipline) and consequently more progressive. Although he continued to foster economic development, he appears to have given new attention to education in a broad sense. The prisons were reformed and their inmates were required to learn useful trades, primary schools were extended to even remote villages, and secondary schools were increased in number. All the teaching remained in charge of the religious orders, most of the secondary training being given by the Jesuits. A polytechnic school (said to have been the first in South America) was founded, and also a college of medicine; an astronomical observatory, long under construction, was completed; an academy of fine arts was opened with Italian professors in charge; and a conservatory of music was planned.

The Church received attention in various ways. Early in his second term the dictator did much toward improving the discipline of the religious orders and toward stimulating the clergy as a whole to greater industry. Since it was found impossible to keep heretics out of the country, to discourage their coming as much as possible without using inquisitorial methods they were deprived of civil rights. With the passage of time the religious devotion of the dictator became more intense. His state papers, a contemporary writer remarks, read like bishop's sermons. So great was his devotion to the Church that he had congress vote the Pope gifts from the public treasury. Finally, in 1873, he induced that docile body to pass a resolution consecrating Ecuador to the "Sacred Heart of Jesus." García Moreno's aim was to bring about and maintain, with the aid of the clergy, a virtuous, orderly state which should be under the permanent moral guardianship of the Pope. In his enthusiasm for his plan he made to the Holy See such concessions as crowned heads of medieval Europe would not yield even under coercion.

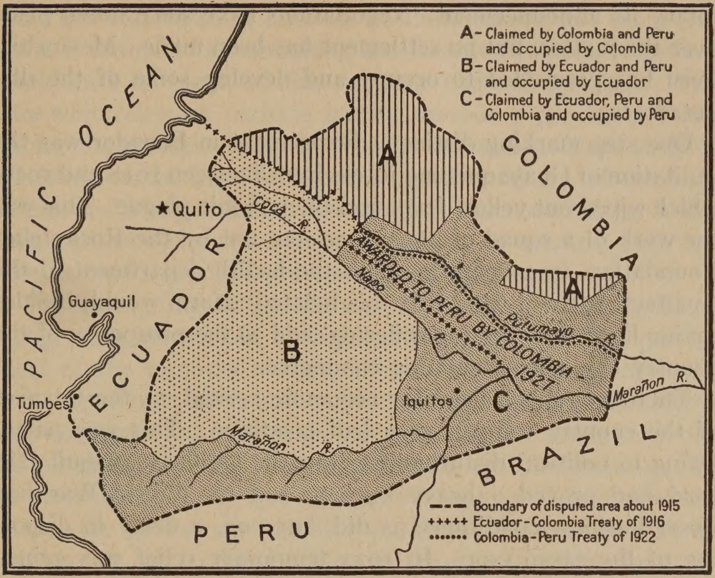
Though he was reëlected in 1875 for a six-year term, he did not long continue as head of the little "Republic of the Sacred Heart of Jesus." On August 6 of the same year he was attacked by enemies near the steps of the capitol and was killed by a blow from a machete.

Now came the usual sequel to the downfall of a strong dictator,—a period of anarchy. Anticlerical revolts broke out simultaneously in different parts of the country. During the next twenty years the Conservatives managed to be in power most of the time, but disorder was the rule rather than the exception. It was a time of brigandage, riots, revolts, revolutions, civil wars, financial chaos, and arrested progress—even of retrogression.

Finally, in September, 1895, Eloy Alfaro, an unusually persistent Liberal, got control of Quito, an event that inaugurated the Liberal régime still existing in Ecuador. During the first part of the period Alfaro, elected president under a constitution adopted in 1897, was the most influential figure. One of the objects in framing a new fundamental law was to deprive the Roman Church of its monopolistic position; consequently the Liberal constitution granted religious freedom and set aside practically all the provisions of the concordat of 1862. Though the Roman Catholic remained the state religion, it was made dependent upon the civil authorities for support. Later, laws were passed legalizing civil marriage, permitting divorce, prohibiting admission of new monastic orders to the country, and secularizing such rural Church property as was not being directly used for religious purposes. In the twelfth and latest constitution of Ecuador, adopted in 1906, there was definite stipulation that education should be under secular control. The measures in the former basic law tending to weaken the Roman Church were retained, and the machinery of government remained centralized.

In Eloy Alfaro's first term was completed the Guayaquil-to-Quito railroad of which García Moreno had dreamed. The contract, given to an American company during Alfaro's first term, stipulated that the Ecuadorean government was to pay the expenses of construction and to guarantee the company against loss during the first six years of operating the road. Because of the rugged mountain wall separating the two cities, the engineering feats were very difficult and the work went slowly; but in 1908 the completion of the two hundred and ninety miles of track was officially achieved when América, daughter of Alfaro, who was again president, drove a golden spike to unite the last two rails of the road. Thus the capital and the interior of Ecuador were at last connected by quick transportation with the outside world, an accomplishment which did much toward fostering progress.

Eloy Alfaro, dissatisfied with the policies of the Liberal president elected in 1905, had revolted and in the following January gained control of the government. Elected president, he, like García Moreno, in an effort to guard against and exterminate his political enemies, carried on what was virtually a reign of terror during his four years in office. After his term expired he was for two years the chief leader in revolt against the government, but was finally defeated and imprisoned in Quito. Shortly afterwards he and a number of other political prisoners were seized by a mob and hacked to pieces. For several years after the end of Alfaro's second term insurrection was almost chronic; but since about 1916 the country has been more orderly, though not free from revolution.


A– Claimed by Colombia and Peru and occupied by Colombia
B– Claimed by Ecuador and Peru and occupied by Ecuador
C – Claimed by Ecuador, Peru and Colombia and occupied by Peru
PACIFIC OCEAN
COLOMBIA
ECUADOR
PERU
BRAZIL
Quito
Guayaquil
Tumbes
Iquitos
Coca R.
Napo R.
Putumayo R.
Marañon R.
AWARDED TO PERU BY COLOMBIA 1927
A
B
C
Boundary of disputed area about 1915
+++++ Ecuador-Colombia Treaty of 1916
••••••• Colombia-Peru Treaty of 1922

ECUADOR AND TERRITORY INVOLVED IN BOUNDARY DISPUTES

Adapted from map in Pastoriza Flores's *History of the Boundary Dispute between Ecuador and Peru*

Ecuador's weakness and backwardness due to political ills put her at a disadvantage in connection with the settlement of disputed boundary lines, for she made no serious attempt to occupy the areas claimed; hence in 1904, by a treaty signed with Brazil, she gave up territory in the Amazon valley to which she had declared a title, and accepted a boundary line running from the mouth of the San Antonio River to the mouth of the Apaporis. In 1916, by an adjustment with Colombia already referred to, she made more concessions than the latter because she wanted Colombian support against the more aggressive attitude of Peru in the triangular boundary dispute. After much discussion Peru and Ecuador had agreed in 1904 to submit their dispute to the king of Spain for arbitration, and a decision was reached by that monarch; but it was withheld, for there was reason to believe that war between the two countries would follow its announcement. Negotiations have since taken place over the matter, but no settlement has been made. Meanwhile Peru has proceeded to occupy and develop some of the disputed area.

One step marking distinct advancement in Ecuador was the sanitation of Guayaquil and its environs between 1918 and 1920, which wiped out yellow fever and the bubonic plague. This was the work of a squad of physicians sent out by the Rockefeller Foundation, in coöperation with the health department of the country. It was hoped that this belated reform would, besides saving lives and averting suffering, add to the prosperity of the country through stimulating commerce.

There was much need for economic revival, as the finances of the country were in very bad condition. This was partly owing to political disturbances; but the Quito-Guayaquil railroad had proved a heavy burden, and the World War had upset business conditions, as did, later on, a delay in disposing of the cacao crop. In 1923 temporary relief was gained through a loan of $18,000,000 from London bankers, guaranteed by customs receipts. This sum was largely used for meeting domestic debts, for buying a controlling share in the Quito-Guayaquil railroad, and for beginning construction of other lines. The most important new road to be undertaken is to run from Esmeraldas, on the coast north of Guayaquil, to Quito; this will afford a shorter and quicker route from salt water to the capital.

About 1920 and thereafter the income of the country was somewhat increased through the development of the petroleum industry. The oil deposits were declared the property of the State and the output was taxed; but the yield was small.

Beginning in 1924, the income from agriculture was for three or four years much reduced by a disease attacking the cacao, by far the most important crop. The decrease in production was very marked. Coffee and tagua nuts are the next crops in importance. Ecuador has for some time produced about 80 per cent of the world's supply of tagua nuts. Cotton-growing is being extended.

Ecuador

No general census of Ecuador has been taken; but the population is estimated at something less than two million, including inhabitants of much of the territory claimed by Peru. The pure-white element perhaps hardly exceeds 5 per cent of the whole; the aborigines may be twice as numerous. Most of these are found in the high Andes or the eastern slopes of the Cordillera, and a large fraction have scarcely been touched by European culture. The rest of the population is mestizo, with the exception of a small Negro element on the coast.

The dominating whites have monopolized most of the land, though they work only a small portion of it, and that poorly. Most of the mestizos are kept down to the rank of artisans, petty merchants, and small-scale farmers. Some are farm laborers; but in general such work is supplied by the aborigines, who during most of the last century were debt serfs, living in squalor on the merest pittance and largely at the mercy of their masters. During the last two or three decades, however, an aroused public opinion has led to the abolition of the system along the coast and near the larger towns; and since 1922 the Junta Protectora de la Raza Indigena has been working toward the freeing of the Indians elsewhere; nevertheless even the free laborers, with the exception of those in the more sophisticatd coastal section, are very poorly paid and live in extreme wretchedness.

Though a good deal has been done for education during the past decade, most of Ecuador's population is illiterate, and primary schools are hardly to be found in the country districts. The school system, however, is rather progressive. Normal schools exist for the training of teachers, and girls have recently been admitted to the public secondary schools to enable them to prepare for the universities at Quito and Guayaquil. There are also trade and agricultural schools. The National Library in the capital has a rather good collection of books, but is poorly housed.

XXIV

BOLIVIA

OF THE ten South American countries Bolivia has had the most incessantly troubled history. The fact that most of the population were isolated on a bleak, lofty plateau, cut off from world currents, made for backwardness in the small minority of whites, and the remainder of the inhabitants were mentally benumbed aborigines. In view of the general demoralization existing when independence was won, this situation foretold selfish struggle for office and indifference to constitutional principles. Since none of the ambitious were strong enough to establish long-enduring dictatorships, instability of government was chronic and the resulting political turbulence was great.

Moreover, the state was unfortunate in receiving from Simón Bolívar a constitution in which the Liberator's political theories ran amuck. This basic law provided for a highly centralized government (which was desirable) with a president elected for life, but with other very complex arrangements, including a tricameral congress made up of censors, senators, and a house of tribunes. Besides sharing in legislative functions each of the chambers had important special duties, the censors being given the impossible task of seeing that the constitution, laws, and treaties of the land were obeyed.

Such a machinery of government, though probably suitable for Roman statesmen, was far too complex for amateur politicians accustomed to gaining their ends by aid of the sword. This constitution was, in the opinion of one writer, the greatest weakness of Bolívar's life. Recognized as a misfit, it was unpopular from the first, and no serious attempt was made to put it fully into effect.

However, though the first constitution gave Bolivia a bad start, it must be admitted that the eight others that followed it, framed by the Bolivians themselves, apparently did nothing to mend matters. Furthermore, there is little evidence that the strife and turmoil that constantly tore the country were provoked by honest differences of opinion over serious questions, such as the status of the Church or the relation of the local units to the central government. The trouble was caused chiefly by demoralized *mis*-leaders of the ignorant masses, who played the sordid game of militaristic politics with the headship of the government as the chief prize. In less than three quarters of a century after independence more than sixty revolts and revolutions took place, and during that period six presidents were assassinated.

Under Bolívar's constitution General Sucre was elected president late in 1826. Though Sucre accepted the office with reluctance, he promptly began to work for the material and educational advancement of the country. He was handicapped almost at once by trouble arising from popular resentment due to the belief that Colombia aimed at dominating the country, a view strongly supported by the facts that two thousand Colombian soldiers had been retained in the country and that Sucre, a Venezuelan, had been made its president through Bolívar's influence. Numerous Bolivians were especially indignant over the latter arrangement, for they aspired to the office themselves. Peru, engaged in a boundary quarrel with Colombia, noted with growing hostility the seeming designs of the latter upon Bolivia; and political leaders of the country—including a Bolivian, Andrés Santa Cruz, who was president of the Peruvian council of government—worked to weaken and overthrow Colombian authority in Bolivia. In consequence of these various influences the loyalty of the Colombian soldiers was undermined, and on April 18, 1828, some of the troops stationed in the capital rebelled against Sucre, who when he arrived at the scene of disorder was badly wounded in the right arm and arrested by the insurgents.

As soon as word of the success of the revolt reached the commander of the Peruvian armies, which had been massed on the Bolivian frontier, he advanced into Bolivia under the pretext of restoring order and protecting Sucre. It is probable that some of the conspirators, including Santa Cruz, aimed to annex Bolivia to Peru. Finding himself helpless, Sucre negotiated with the invaders, and on July 6 consented to their demands that he resign his authority and withdraw the Colombian troops from the country. A few weeks later, after warning the Bolivians to try to preserve their independence at all hazards, Sucre departed for the north.

Congress elected as provisional president Andrés Santa Cruz, whom Sucre had recommended for the position; but Santa Cruz was absent in Chile on a diplomatic mission for Peru, and before he reached La Paz in May, 1829, the provisional vice president had been pushed aside, the man elected to replace him had been assassinated, and general confusion reigned. Santa Cruz was a mestizo of unusual energy and ability, and this seems to explain why Sucre suggested him as the head of the state; for Sucre well realized that it would take a strong man to save Bolivia from anarchy and from domination by Peru.

The new president soon had order restored and was launched upon a program of governmental reorganization, financial reform, and general development of the economic resources of the country. In his message to congress in 1831 he urged that the country be made as nearly as possible materially self-sustaining. In that year Bolívar's unwieldy constitution was set aside and a new one was adopted that provided for a four-year presidential term and balanced governmental departments as in the United States. It also definitely prohibited slavery in Bolivia. Santa Cruz was made first president under this simplified basic law.

From the outset Santa Cruz had evidently hoped to unite Peru and Bolivia, and in 1835 he was given a pretext for doing so through a request of a Peruvian factional leader for aid. He responded by putting down the uprising in the neighboring state, which he then organized into Northern Peru and Southern Peru with a president for each part; and united the two states with Bolivia to form the Confederación Peru-Boliviana. Santa Cruz had himself made "supreme protector" of the whole, and another was put in his former position. But the new political structure was very short-lived. Even before factional jealousy had time to wreck the confederation its neighbors had done so. Chile and Argentina were far from pleased over Santa Cruz's apparently imperialistic ambitions and sent armies against him. At first both invading forces were defeated and the struggle was halted, but in 1839 it was resumed by Chile, whose armies worsted Santa Cruz. This broke up the confederation and eliminated Santa Cruz, who went into exile.

Now followed forty years of almost continuous anarchy, punctuated by additional disasters of various sorts. Of the many holding the political reins during the time the most worthy was perhaps José Ballivian, who was proclaimed president by the army in 1841. After defeating invading forces from Peru, which had recently given much trouble, Ballivian made generous terms with them, thus establishing friendly relations between the two countries. In his internal policy he was enlightened though despotic: he furthered the economic development of the country, erected public buildings, including hospitals and prisons, extended public education, which was almost nonexistent, and encouraged the arts and sciences. But he was harassed by repeated insurrections, part of them incited by Santa Cruz, who was trying to regain control; tired of combating them, he resigned in 1847 and left the country.

The worst ruler who has blighted Bolivia with his presence was perhaps the vain, thievish, bloodthirsty warrior Mariano Melgarejo, who was in control from December, 1864, to January, 1871. Among various high-handed acts, he debased the coinage in minting *melgarejos* in his own honor, and sold at public auction many of the communal lands of the Indians, thereby reducing the latter to greater wretchedness than before. He was responsible also for two unpopular boundary treaties. One, made in 1867 with Brazil, gave that country a large tract of territory on the upper waters of the Madeira and Paraguay rivers; the other, which was destined to make great trouble for Bolivia, was signed the year before with Chile to settle a dispute over the Atacama Desert, where guano desposits had begun to be exploited by the Chileans. By this treaty Melgarejo virtually ceded to Chile territory to which Bolivia was apparently entitled, lying to the south of the parallel of twenty-four degrees south latitude, which was now accepted as the tentative boundary. Both countries were to have equal right to exploit guano found between the parallels of twenty-three and twenty-five degrees and to the revenues from such duties as might be levied upon the minerals sent out of the region.

Within the next few years the Bolivians neglected the resources of this desert strip and nationals of Chile worked it more energetically and soon were making fortunes from the nitrate beds. The largest enterprise of the region was the Nitrate Company of Antofagasta, to which Melgarejo granted a fifteen-year concession. The Bolivian government, however, failed to pay over the money due to Chile from Atacama exports, while it levied special taxes upon the Chilean nitrate and guano exploiters. Protest followed from Chile, and finally another treaty was signed, in 1874, whereby the twenty-fourth parallel was made the permanent boundary line and Chile gave up all claim on revenues collected to the north of it, and in return Bolivia agreed not to increase for twenty-five years the tax laid upon the output of Chileans working on Bolivian territory.

Meanwhile the Peruvian government had been anxious to monopolize its own rich nitrate beds in the province of Tarapacá; but a good price could not be secured in Europe unless an arrangement could be made with Bolivia, the chief competitor. Hence that country was approached, and in 1873 a secret treaty of alliance was formed between the two. About this same time Peru evidently urged Bolivia to raise the export duties on nitrates sent from Atacama in order to secure a better price for all nitrates in Europe. In 1875 the Bolivian government undertook to increase export taxes, but desisted when Chile protested in the name of the treaty made in 1874. Three years later, however, when Chile was embarrassed by a boundary dispute with Argentina, Daza, the notoriously unscrupulous dictator of Bolivia, induced congress to pass a law placing a tax of ten centavos upon each hundredweight of nitrates sent out by the Chilean Nitrate Company of Antofagasta. In response the company protested vigorously and refused to pay the illegal impost. The Bolivian authorities, despite the protests of the Chilean government, seized the property of the company and announced that it would be sold on February 14, 1879, to secure the taxes called for.

On that date Chilean troops took possession of Antofagasta, thus opening the War of the Pacific. Peru quickly came to the support of her ally. Chile, with a much smaller population than Peru and Bolivia combined, was far more orderly and progressive. Furthermore, her navy was twice the size of the allied navies and her men were well trained. By the close of 1879 the two weaker navies were destroyed, and by the following October Chile had occupied the Atacama region and also the Peruvian provinces of Tarapacá, Tacna, and Arica, and had bombarded various coastal towns. At this point the United States government tendered its good offices in the interest of bringing about peace. A conference was held in October, 1880, on an American war vessel at Arica; but as Chile demanded victor's terms, which neither Peru nor Bolivia was willing to grant, nothing came of the effort. Fighting was resumed, and on January 17, 1881, the Chilean armies occupied Peru's capital.

Bolivia played a very feeble part in the war and was helpless when it ended. Daza, who had shown himself wholly incapable of meeting the crisis which he had precipitated, was overthrown in December, 1879, and was succeeded by Narciso Campero, a man of more character and intelligence. The situation was a very difficult one; for the war left the Bolivian nation marooned upon the lofty Andean table-land with its rich littoral occupied by Chile, which in the negotiations of October, 1880, had demanded permanent possession. To Bolivia the transfer of Arica to Chile would be scarcely less of a calamity than the loss of her own seacoast; for by arrangement with Peru she had used this conveniently located port even more than she had the harbors of Atacama, which were farther removed from the industrial centers of the country. Hence the Campero government, very unwilling to make such terms as would leave the country at the mercy of Chile for access to the coast, demanded that Chile negotiate peace with both its vanquished neighbors simultaneously. This was not done; for Chile and Peru signed a separate agreement in October, 1883, which was ratified the following year. By this treaty of Ancón, Peru permanently ceded Tarapacá to Chile and consented to Chilean occupation of Tacna and Arica for ten years, at the end of which time a plebiscite held in the provinces should determine their ownership. The nation losing by the vote should receive from the winner ten million Chilean silver pesos, or the equivalent.

Since this arrangement offered little hope for Bolivia, and since she was unwilling to reconcile herself to a permanent cutting off from the coast by definite cession of her littoral to the victor, the Chilean authorities suggested an indefinite truce. This arrangement was made, but it was stipulated that the truce might be ended upon a year's notice by either party. Meanwhile Chile was to occupy the coastal strip that was once Bolivia's. Commercial relations were to be resumed on a somewhat reciprocal basis, but part of the tariff duties which Chile conceded to Bolivia from the region was to be applied toward payment of old debts owed to Chileans and to indemnification for the Chilean property at Antofagasta confiscated by the Bolivian government.

For some years nothing was done by Bolivia to establish technical peace with Chile or to secure a national outlet on the Pacific; but in 1891, when bad feeling had again developed between Chile and Argentina over the boundary question, President Arce of Bolivia decided to get the aid of Argentina in securing terms from the recent foe. Accordingly a treaty was signed with Argentina in which she agreed to give the help desired, with the understanding that Bolivia would seriously consider incorporation with the Argentine Republic. This arrangement inclined Chile to a more conciliatory attitude; and in 1895 she signed with Bolivia an agreement specifically recognizing the latter's right, in compensation for the loss of the Atacama region, to a Pacific port and a corridor to it. In return for Atacama she therefore agreed to provide the needed harbor within two years. If this were not done the definite cession of territory would not take place. The port was not provided, and matters remained unsettled for some years more.

In the meanwhile Chile and Argentina had settled their boundary dispute and were on friendly terms, so that Bolivian hopes for aid from the latter grew dim. Nevertheless, by the treaty of 1895 Chile had formally recognized Bolivia's right to a Pacific outlet, and with this fact as a basis negotiations were resumed late in 1904. The result was a treaty of peace and amity whereby Bolivia completely surrendered to Chile all title to the Atacama territory, and Chile agreed to supply Bolivia with an outlet to the Pacific by building a railroad from Arica to La Paz. Fifteen years after the road was completed, the part lying within the territory of Bolivia should be transferred to the ownership of that country. In addition, Chile undertook to pay Bolivia 300,000 pounds sterling and to assume the numerous debts owed by Bolivians to Chileans. Thus ended the indefinite truce, which had lasted for nineteen years; but the Arica-La Paz railroad was not completed until 1912.

The long-delayed treaty did not reconcile the Bolivian people to their landlocked position: the hope of securing coastal territory was kept alive. Opportunity for realizing the hope seemed to be offered by the League of Nations, of which Bolivia became an original member. Accordingly in November, 1920, the Bolivian delegate to the Assembly of the League requested a revision of the treaty of 1904 made between Bolivia and Chile, on the ground that it had been signed by Bolivia under pressure and that Chile had failed to keep its provisions; but the Assembly decided not to act upon the question.

Chile and Peru were negotiating at the time with the aim of fixing the permanent ownership of Tacna and Arica (for the plebiscite called for by the treaty of Ancón had never been held), and Bolivia turned to them with the idea of securing the disputed territories; but those two countries would not let her take part in their negotiations. A little later Bolivia appealed to the United States government, under whose auspices a conference on the Tacna-Arica question was to be held; but that government gave her no encouragement.

While Bolivia was harassed by vain regret over territory lost to Chile, soil in other quarters which the country had once owned or claimed with fair title had been alienated, largely because the government neglected to occupy and develop the regions. By a treaty made with Argentina in 1889 that country was granted the part of the Chaco region, over which the two had long disputed, lying between the Bermejo and Pilcomayo rivers. Ten years later serious trouble with Brazil developed in the north over the Acre territory, for which, in 1867, an arbitrary boundary line had been agreed upon by the two countries. Since that time Brazilian rubber-collectors had been permitted to enter the region and settle on the Bolivian side of the line; in 1899 these revolted and declared the territory independent of Bolivia. After two different Bolivian military expeditions had struggled rather vainly with the Brazilian frontiersmen and feeling between the two governments had become tense, the difficulty was settled by a treaty of sale made at Petropolis, Brazil, in 1903. By this Bolivia ceded the whole of the Acre territory to Brazil in return for 2,000,000 pounds sterling and a railroad to be built by Brazil around the cataracts of the Madeira River, to connect with the Mamoré branch of the stream in Bolivia, thus giving that country a commercial outlet through the Amazon. By the treaty Bolivia also engaged to use most of the cash indemnity in the construction of railroad lines or other works which would aid communication and commerce between the two countries. In harmony with a boundary award made by the government of Argentina, in 1909 Bolivia ceded to Peru a small strip of territory in the northwest along the right bank of the Ucayalí River. One boundary dispute remains unsettled, that with Paraguay. This will be taken up in connection with the history of that country (see page 629).

The War of the Pacific, which caused Bolivia her most serious territorial loss by far, had a chastening effect on her politics; since then she has been a wiser as well as a sadder state. Never in the half-century which has passed since the strife ended have governmental matters reached such depths of demoralization as were displayed before. Though there have been several revolutions, on the whole governmental changes have been orderly; bargaining between politicians has tended to take the place of bloody frays. Moreover, faith in new constitutions as political platforms or as panaceas for national ills apparently was lost in the struggle with Chile. In any case the constitution adopted in 1880, when the struggle was on, is still nominally in force, and it is perhaps less of a dead letter than were most of its nine fleeting predecessors. Like them, however, it provides for a centralized government. The president, who is elected for four years, is given great authority in certain matters; but the bicameral congress may by a two-thirds vote pass measures over his veto. The constitution forbade the public exercise of any religion other than the Roman Catholic, except on frontier sections; but an amendment of 1905 granted complete freedom of worship.

A number of the presidents elected under the present constitution have had ability and the desire to serve the nation. From 1880 to 1899 a Conservative oligarchy was in power, but in the latter year a change took place precipitated by a conflict over the location of the national capital. La Paz, Sucre, Cochabamba, and Oruro had at different times enjoyed the honor of being the seat of government; but in 1898 the Conservative element started a movement to make Sucre the permanent capital. This was resented by the politicians of La Paz, where federalism was strong, and in December of that year they revolted under the lead of José Manuel Pando, a federalist Liberal. Pando's forces won after a short struggle, and he was made president. This inaugurated the present progressive rule in Bolivia, carried on by the Liberals until 1920, when the Republicans came in; but the difference between the two is largely a difference in name. Perhaps the most able president the country has had was the Liberal Ismael Montes, who held the office from 1904 to 1909 and from 1913 to 1917. Because of his vision, energy, and achievements, he won the name *El Gran Presidente*. Some of his work will be mentioned later.

The chief interest of the Bolivian governments since the War of the Pacific has been the economic development of the country, especially through bettering the means of transportation. In the latter half of the nineteenth century steamboats began to compete with balsas and dugout canoes on Lake Titicaca and the upper waters of the Amazon tributaries, and these facilitated commerce to some extent; but there was need for more and better vehicular roads for the mule teams, which in various sections could be used in freighting from the mines, and also for more railroads. During the last quarter of a century great expansion of the cart roads has taken place; in 1928 nearly seven thousand miles of these were reported to exist. Much of the construction was made possible by a special road tax paid by the better-to-do element and by forced labor of the Indians, called the *prestación vial*, of four or more days a year.

For some years after the War of the Pacific the economic prostration of the country prevented the government from making much headway with railroad-building; but the increase in revenues due to the development of tin-mining and the money coming from the sale of Acre enabled the Liberals to launch a construction program, which was continued by means of large loans from American bankers. Before Pando's term ended, a short road was built from Guaqui to La Paz; but there was a gap between it and the only other railroad operating in the country at the time, which ran from Antofagasta northeast into the interior, terminating at Oruro. Under Montes a line was built from Oruro to Viacha, where it joined the Guaqui road, thus giving La Paz, 12,500 feet above sea level, rail connection with the coast. The Guaqui line was also extended to the coast about the same time, ending at the port of Mollendo, Peru. As has already been stated, in 1912 Chile completed the promised railroad between Arica and La Paz, the quickest route between the capital and the coast; nevertheless as late as 1927 only one passenger train a week made the trip. Another recently constructed line of importance runs northeast from La Paz to Yungas on the Beni River in the Amazon basin. During the administration of Elidoro Villazón (who was president between Montes's two terms and carried out Montes's policies) the line from Oruro to Potosí, in the heart of the rich mining region, was opened. This crosses a range of the Andes at a height of more than 15,800 feet. Some years later Brazilian engineers completed the Madeira-Mamoré Railroad promised by the treaty of Petropolis. Perhaps more important in its potentialities is the union of La Paz with Buenos Aires by rail; this was achieved in 1925 through connecting a number of existing lines. In 1928 Bolivia had about thirteen hundred miles of railroads completed and many hundreds of miles projected.

In consequence of the increase in transportation facilities, Bolivian tillage agriculture has expanded considerably since colonial days; but the methods of work remain primitive in the country as a whole, though a start toward more progressive ways was made during Montes's second administration through the introduction of training in scientific agriculture. Then, too, even at the present time the domestic animals of Old World origin are few in number and degenerate in breed. The llamas and alpacas, raised by the Indians on the high plateaus, are much more numerous and constitute the Indians' most valuable possessions. On the steep slopes of the Andes and the bleak stretches of the table-land the Indians cultivate little patches of vegetables and cereals as did their ancestors in the days of Inca rule; but in other parts larger-scale production with more modern methods has been carried on. In the *yungas*, or Bolivian valleys of the Amazon basin, in particular, there has been recent development along modern lines, to some extent with foreign capital. Here the chief crops are rubber, sugar cane, cotton, coca, and cacao. The rubber, a considerable portion of which is still gathered wild, though cultivation is expanding, is sent out by way of the Amazon. The other products are consumed locally; for the high cost of transportation to the plateau prevents them from competing there with foreign imports from the Pacific side.

Bolivia's richest resources are its mines; but the veins of gold and silver, though by no means exhausted, were not worked so actively during the past century as in colonial days. Though a good deal of silver is still taken out, the production is steadily diminishing. Lead and, to a lesser degree, copper have been mined on only a small scale, though the ores seem abundant; but during the last three decades the production of tin developed to mammoth proportions, making Bolivia the second country in the world in tin production. Little tin-mining was done in the country until 1895, when the exhaustion of the tin mines of Europe and the great increase in the use of the metal stimulated interest in Bolivian tin, which soon began to compete with the products of Asia and Africa. In 1900 the country exported 16,000 tons of tin and tin ore; in 1925 it exported 60,000 tons, valued at about $16,000,000. During the last few years Bolivia's output of tin has formed more than two thirds of its active mineral wealth and has provided nearly one fourth of the world's supply of the metal.

Most of the country's meager manufactures—coarse cotton and woolen textiles, rugs of alpaca and vicuña skins, shoes, molasses, sugar, and rum—are consumed locally. The chief exports are rubber, silver, copper, lead, and tin.

The estimated population of Bolivia is about 3,500,000, made up almost completely of nationals. Probably almost half the inhabitants are pure-blooded aborigines, many thousands of whom live wild in the forests and jungles; perhaps from 6 to 8 per cent are whites; the rest are mestizos, in whom, on the coast, a slight strain of Negro blood exists. Most of the heavy labor is done by the settled Indians, chiefly Aymarás, who are docile and industrious and are absolutely indispensable in the rarefied atmosphere of the high mining regions, where others can scarcely survive; but they are commonly treated badly and live in great wretchedness. A large portion of them are restricted in their freedom, and often have to serve the village priest and some landowner as well as to work on the public roads. The pay received by those who are supposedly free has always been very small, and in addition the laborer is subjected to various extortionate fees and taxes. As in many other Latin-American countries, most of the soil is in the hands of the dominant white element, and that left for the low-class mestizos and settled aborigines is in many cases of inferior quality and inadequate to their needs. Though laws of 1874 and 1880 ordered the distribution in severalty of the Indian communal lands, to a large extent they are still held in common.

Education had made very little progress in Bolivia by the close of the nineteenth century, and probably about 90 per cent of the population was then illiterate. After that headway was made, for various presidents, especially Ismael Montes, gave attention to the problem. The number of primary schools has been considerably increased, and in 1928 the enrollment was about eighty thousand. Instruction was also given to illiterates in the army. At that time there were about twelve or fifteen secondary schools with perhaps five thousand pupils enrolled. Better standards for education were secured through sending many young people abroad to study, through the introduction of normal schools, and through welcoming Protestant missionaries, who by a law of 1906 were given freedom to work in the country and establish schools. During the last decade or two much attention has been given to vocational training, and schools of arts and crafts exist in all the larger towns. Professional education is supplied by a number of universities and professional schools, the most important university being that of La Paz. There are a few agricultural schools and model farms scattered through the country, and at Oruro there is a national school of mines.

XXV

PERU

THE circumstances connected with Peru's liberation from Spain added to its chances for a troubled start in national life. On its soil met the northern and southern movements for the freedom of the Indies, and to neither of them did the country wholly owe its emancipation. This served to make loyalty to Bolívar as well as to San Martín especially short-lived. The fact that in the interval between the withdrawal of the one and the arrival of the other Peru had begun to experiment with self-government later encouraged suspicion and disaffection. In 1822 the "bases" of a constitution for the "Peruvian Republic" were adopted, and the frame of government itself—providing for a centralist government, with a president elected for four years and a unicameral legislature—was proclaimed the next year. The congress which drew up the constitution made Bolívar dictator shortly after he reached Lima; but the arrangement was merely in the interest of efficiency in completing the work of independence and was intended to be temporary.

Despite the great service Bolívar had rendered in driving out the Spaniards, feeling against him was already strong in Peru when, in September, 1826, he returned to Colombia because of disturbances there. The reasons were various: the clergy resented decrees he had issued to curtail the privileges of the Church; portions of the lay element had taken offense at other enactments; there was much resentment, especially among Peruvian officials, over the retention of Colombian troops in the country after the war for independence was over, and this added to the suspicion that Bolívar intended to bring Peru into confederation with Colombia and to make himself permanent ruler of the whole. This suspicion seemed justified when, two months after his departure, the council of government that he left in charge brought about the adoption of the impracticable constitution which the Liberator had drawn up for Bolivia a few months before and, under it, his election as life president of Peru.

Peruvian resentment at these last measures was easily converted into action, because the Colombian troops in Peru were also disaffected. Some of them were roused over Bolívar's ambitions with reference to their country, and apparently all wanted to be paid and sent home. The first result of this was the mutiny in January, 1827, of one of the Colombian divisions, the members of which received their back wages a little later and departed for home. Within the next few months the anti-Bolívar element in Peru sent away the remaining Colombian troops, ousted Bolívar's council, set up a provisional government, and adopted a new constitution based upon that of 1823.

As has been said, in 1828 the Peruvian authorities intervened in Bolivia and eliminated from there General Sucre as well as the Colombian troops.

These disorders connected with the freeing of Peru from Colombian influence were but the beginning of twenty years marked by political turbulence and foreign wars. The first of the wars was a short struggle in 1828 and 1829, due basically to a dispute over ownership of part of the province of Mainas and the whole of Jaén. The former had come under the viceroyalty of Peru in 1802, and the latter in 1821. During the struggle for independence the territory was for a time under Peruvian political jurisdiction, but since 1824 it had been under Colombian control. When the friction between the two countries reached a climax in 1828, Peru sent forces north with the aim of annexing Guayaquil; but, thanks largely to troops led by General Sucre, the invading armies were finally defeated decisively, and in February, 1829, the Peruvian commander agreed to terms involving withdrawal from the soil claimed by Colombia, the surrender of a war vessel, and the payment of $150,000 to Colombia.

Perhaps most Peruvians welcomed the confederation formed by Santa Cruz in 1836, for they were tired of the domestic turmoil and knew the dictator as a man of ability from his services as president of the council of government in Peru; but he had many sturdy opponents, some of whom fled to Chile when his victory became certain. There they plotted with the Chilean authorities for his overthrow, and later they accompanied the armies of Chile which brought about his downfall and the destruction of the Peru-Bolivian confederation in 1839. For five years after that event political chaos reigned in Peru.

Then, in July, 1844, there emerged as military victor a mestizo from Tarapacá, Ramón Castilla, an honest, daring, tolerant man of marked ability, who the next April was made constitutional president of the country for six years. Under Castilla peace and progress came to Peru, partly because he granted amnesty to the exiled supporters of Santa Cruz and gave some of the ablest of them positions in the government. Fortunately for the financial needs of the country, there began a large European demand for Peruvian nitrates and guano. The nitrates, coming from the desert stretch of Tarapacá, were taken out in increasing amounts; but the greater source of revenue in Castilla's day was guano from the Chincha Islands in the bay of Pisco. Through monopolizing this fertilizer the government had for a time an annual revenue of nearly $15,000,000. By means of this unwonted public income Castilla was able to consolidate the internal debt and to begin its reduction, and also to begin payment of interest on loans secured in London during the wars for independence—financial obligations so far ignored. He also reorganized the army and strengthened the navy and gave much attention to internal improvements. In 1847 an electric telegraph line was opened between Lima and Callao, and four years later the two cities were connected by railroad. Other telegraphic and rail communications followed between important points. In the interest of securing labor a liberal immigration law was adopted; and in 1850 there were introduced into Peru the first Chinese coolies, an element whose presence was later greatly resented in the country.

At the close of his term Castilla was succeeded by José Rufino Echenique, evidently the candidate he favored. For a while all went well; but by the end of three years corruption, encouraged by the abundant national income as well as by general inefficiency, became evident in the government. The result was an uprising against Echenique early in 1854, which Castilla soon joined. In January, 1855, Echenique was defeated and sent into exile, and a few months later Castilla was elected president of Peru for another six years.

During his second term he followed the same general policy as before. Much emphasis was given to economic development, but other aspects of national welfare were not overlooked. Education was fostered, the aborigines were freed from the payment of tribute, and the Negro slaves—about fourteen thousand in all—were emancipated. A new constitution was drawn up which went into effect late in 1860. This basic law, which remained in force for fifty-nine years, was centralist in character, as was its predecessor. It differed from the latter, however, in that the president was to be elected for four years instead of six and could not be immediately reëlected, and in that his power was limited by provision for a commission of congress which should act for that body between sessions.

Castilla's second term was not so peaceful as was his first. An insurrection against the Castilla government took place in Arequipa in October, 1856, became serious owing to the mutiny of the fleet, and was not crushed for almost a year and a half. Hardly had domestic order been restored when trouble developed with Ecuador because it was discovered that in 1857 that country had attempted to pay a portion of its foreign debt by granting to creditors a tract of land in the Oriente section claimed by Peru. It was this that caused the Peruvian fleet to blockade the Ecuadorean coast in 1859 and to force from Franco, the caudillo dominant in Guayaquil, the treaty already mentioned as repudiated by García Moreno of Ecuador. In 1862 the agreement was set aside by the Peruvian congress too, on the ground that it was negotiated with a faction and not with the Ecuadorean nation.

When his second term ended in 1862 Castilla retired, and there began a ten-year period of political disorder, extravagance, and corruption. The large financial surplus from the exploitation of guano and nitrates, instead of being spent in the extension of schools and roads and in other internal improvements, was used by characterless officials to reward political friends or to buy off political enemies. In the midst of this dreary time came friction with Spain, followed by war. As yet the latter had not recognized Peruvian independence, and Peru's suspicions of the mother country had recently been roused by her attitude toward the Dominican Republic and Mexico. Resentment grew because Spaniards tried to collect damages for injuries done during the wars for independence. A little later blood was spilled in a quarrel between subjects of Spain and Peruvians on an hacienda in Peru. In consequence the Spanish government demanded satisfaction and sent a naval fleet into the Pacific, ostensibly on a scientific expedition. When Juan Antonio Pezet, at the time president, failed to grant the terms demanded, the Spanish fleet, in 1864, seized the prized Chincha Islands. Negotiations followed, and Pezet agreed to pay the claims made by Spain and also the expenses of the naval expedition sent against his country; but public indignation over the terms caused a successful revolt against him, led by Mariano Ignacio Prado, who became president and prepared for war against Spain by forming alliances with Ecuador, Bolivia, and Chile. During the conflict (which began in January, 1866) between the quadruple alliance and Spain, the latter bombarded Callao; but the allies had the advantage, and after a few months of struggle the Spaniards withdrew. Some years later treaties of peace were made between the belligerents. By that between Spain and Peru, signed in 1879, the independence of Peru was finally recognized by the mother country.

In 1868 José Balta, well-meaning, energetic, and progressive, but of poor judgment, became president of Peru and took up the pressing financial problems and adopted plans for the internal development of the country. Owing somewhat to the brief war with Spain but more to extravagance and stealing by public officials, money was lacking even for meeting current expenses; and the holders of concessions for exploiting guano had advanced to the government large sums which had to be made good. To meet the crisis, in 1869 President Balta obtained a loan from Dreyfus and Company of Paris, giving in return a virtual monopoly of all guano exported until two million tons of it should have been conveyed to the banking firm. It was assumed when the arrangement was made that by the spring of 1871 enough guano would have been delivered to wipe out the existing deficit, pay the money already advanced by Dreyfus and Company, and meet the service of the foreign debt. Unfortunately the government continued to ask loans on future deliveries of guano, and the deliveries fell off in both quantity and quality. Nevertheless Balta secured other loans from Paris and London for the amortization of the earlier public debt and for carrying out a program of internal improvements. These new obligations brought Peru's foreign debt up to about $240,000,000.

A considerable portion of the money obtained by loans was applied to the material development of the country. Several contracts for railroads were let, most of them to Henry Meiggs, an American building contractor. Various short roads were included in the construction program, and also lines connecting Arequipa with Mollendo and Callao with Oroya. A number of harbors too were improved by the Balta administration; new public edifices, especially churches, were erected; and much attention was given to the beautification of Lima, in the interest of which the ancient walls surrounding the colonial portion of the city were torn down.

Balta, partly because of his reckless financial methods, had many enemies, and in 1872 he was overthrown, imprisoned, and murdered. The problems he had helped to create were inherited by his successor, Manuel Pardo. The new president, a man of distinguished family, was the first civilian to be chief executive of Peru; like Balta, he meant well by his country, and in many ways he did well. One of his worthiest ideas was to reduce the influence of the military in government and to create a civilian party. To this end he made a point of giving office to lawyers, business men, and others of the nonmilitary portion of the population. With the further aim of developing the country along lines of peace he tried to train men for leadership in pacific pursuits: he created a school of engineers, setting aside for its support certain incomes from the mines; and he founded a faculty of political science in the ancient university at Lima, with the object of training diplomatists and administrators. With the idea of developing more local responsibility he reorganized the municipalities and gave them control of primary education as well as other new powers. He also planned to continue the program of material improvements launched by Balta as well as to foster educational and other development.

Little money was available for any purpose, however, when the Pardo administration came into office; for the country was on the verge of bankruptcy, general hard times were pending, and the treasury deficit grew at alarming speed. Pardo greatly reduced the army and cut down the number of civilian employees; but these measures offered little relief, for there had been a sharp decline in the revenues of the government because the competition of a newly invented German artificial fertilizer had sent down the price of guano. By 1876 it was impossible to pay the approximately $12,000,000 annual interest on the foreign debt. In an effort to secure more national revenue Pardo decided to make the exploitation and sale of nitrate of soda a government monopoly, and proceeded to expropriate the privately owned *saliteras*, or nitrate works. By 1876 the industry was almost completely in the hands of the national authorities. In this year Pardo was succeeded in the presidency by a military man, General Mariano Prado, who had been in the office before. Prado made the financial situation rather worse by permitting an issue of twenty million *soles* of inconvertible paper currency.

It was Prado who headed the government when the War of the Pacific was precipitated. The dire financial straits of Peru made that country quite unready for war, and it seemed to try to avoid war by offering to mediate the trouble between Chile and Bolivia. Chile refused the offer and demanded that Peru abandon the defensive alliance made by Pardo with Bolivia in 1873. When Peru in turn refused to comply, Chile declared war upon both nations. To what was said in the preceding chapter about the conflict and its outcome a few facts should be added. In occupying Lima the Chileans were guilty of gross vandalism: they wantonly destroyed much civilian property, including school buildings and books belonging to the National Library, from which they also carried away many of the rarest works, among them priceless colonial records. The intense bitterness inspired by these acts helped to make the Peruvians deeply opposed to any peace based upon territorial cession. This fact was well known to the fleeting governments heading the nation after 1879, when Prado practically resigned control by departing for Europe, ostensibly to get aid; hence it was long before any Peruvian administration appeared that would consent to negotiate on the basis demanded by Chile. The terms of the agreement finally made at Ancón and ratified in 1884 have been mentioned (see page 556).

This treaty stipulated that a special protocol should be drawn up for settling the method of holding the plebiscite which was to determine the permanent sovereignty over Tacna and Arica. It is evident, however, that from the first Chile planned, if possible, to retain the two desert provinces (which had no resources of value) as protection against future invasion from Peru; therefore she proceeded to Chileanize them, and disagreed with Peru as to the conditions under which the plebiscite should be held. The question who should administer the provinces during the plebiscite was the cause of especially bitter differences. Peru, not trusting Chile, desired that a neutral nation should assume charge for that occasion, but Chile was opposed to this.

This standing disagreement prevented the plebiscite from being held, and constituted the "Question of the Pacific." During the first forty years after the signing of the treaty of Ancón the matters in dispute were repeatedly discussed, and proposals were made for their solution. For a while it seemed that the dispute would be ended by the Billinghurst-Latorre protocol of 1898, by which the two nations agreed to submit to the decision of the queen of Spain the details concerning the plebiscite; but the negotiations came to nothing because the Chilean house of deputies refused to ratify the agreement after it had been approved by the Chilean senate and by the Peruvian government.

Meanwhile Chilean occupation continued, and the territory was administered as if it were an integral part of Chile, and it was so represented on maps made in the country. In 1910 Peru permanently broke off diplomatic relations with Chile because of the latter's stand on the question. Chile was unwilling to defy world opinion, and early in 1922 she as well as Peru accepted the offered mediation of the president of the United States of America. This led to a protocol made in Washington in the same year, whereby the two countries agreed to submit to the arbitration of the American president the question whether or not the plebiscite should be held and, in case of an affirmative decision, the conditions under which it should be held. In the arguments presented to the arbitrator Peru opposed the plebiscite on the ground of the long period that had passed since the treaty of Ancón and the persistent Chileanization of Tacna and Arica; Chile stood out for the plebiscite and maintained that a fair vote could be obtained. In the award and opinion rendered on March 4, 1925, President Coolidge sided with Chile and ordered that the plebiscite take place.

Preparations for the plebiscite began at once. President Coolidge appointed General John J. Pershing as chairman of the commission which was to plan for and supervise the election, but early in 1926 Pershing resigned and was succeeded by General William Lassiter, governor of the Canal Zone. The commission, sitting in Arica, drafted an election law which was ready by the close of January, 1926. This stipulated that only men who had been born in the disputed territory should be permitted to vote and that balloting should be secret. Though the civil administration of the territory (which had been combined by Chile into one province called Tacna) was to be left to the Chilean authorities, the Chilean government pledged itself to maintain conditions favorable to a fair plebiscite. Registration was to begin on March 1, 1926; but before then friction was rife, and the date was set forward to give time to establish order. When, for a short time, the polls were open for registration, some thousands of Chileans enrolled for voting, but most of the Peruvians remained aloof on the ground of intimidation. This bad local situation caused the authorities at Washington to extend their good offices in the hope that the final disposal of Tacna and Arica might be effected by negotiation; but no agreement could be reached. Since conditions in Tacna and Arica failed to improve, General Lassiter introduced a resolution before the plebiscitary commission on June 9, 1926, stating that the vote planned for was impossible. On the fourteenth of the month he charged in a formal statement that the local Chilean authorities had not only failed to prevent mob attacks on Peruvians but had even abetted them. The commission then voted adjournment.

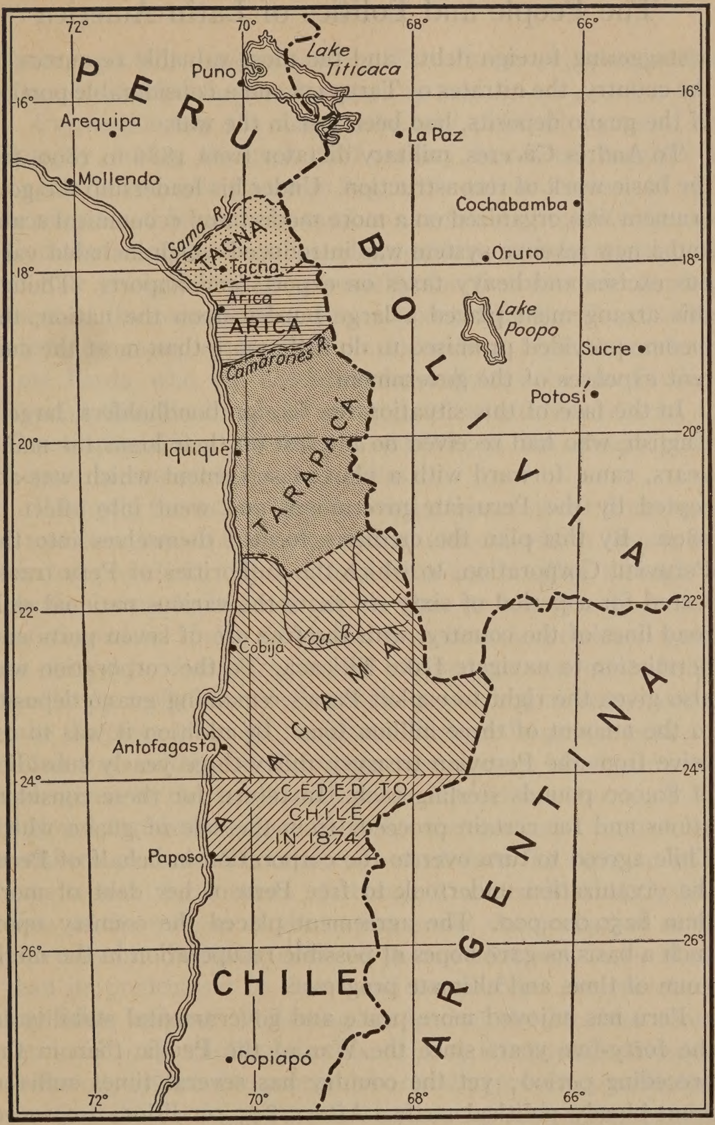
Undoubtedly these accusations were well founded. The failure of the local authorities to do their duty seems also to indicate serious remissness on the part of the national government of Chile. It should be realized, however, that the task undertaken was a virtually impossible one. When the president of the United States decided in favor of a plebiscite he was apparently far more influenced by narrow legalism than by practical considerations. Moreover, he failed to take into consideration Latin-American political methods and political psychology. Having decided in favor of the plebiscite, he made a second mistake in selecting a military man rather than a diplomatist as head of the commission appointed to administer it, a choice which gave a fair basis for criticism from those opposed to the methods and policy of the commission and to the arbitral award that had brought about its appointment.

Late in 1926 Frank Kellogg, the American Secretary of State, suggested that the Tacna-Arica question be solved by cession of the territory to a third country (Bolivia was meant, though not named) in return for proper compensation to Chile and Peru. The former accepted the suggestion in principle; the latter opposed it.

Both nations, however, responded favorably to the recommendation made a little later by Secretary Kellogg that they resume diplomatic relations (severed since 1910) in order that they might negotiate directly, with the aim of reaching an agreement. Before the close of 1928 envoys from each country had been received by the other. In May of the following year President Hoover, at the request of the two governments concerned, offered a plan of settlement, almost completely based on details already agreed upon between the two. The plan was promptly accepted and was transformed into a treaty by which Chile received Arica, and Tacna went to Peru. In addition, Chile agreed to pay Peru the sum of $6,000,000 and to build for her use within the harbor of Arica a port with a wharf and a customhouse and a station for the railroad line running between the towns of Tacna and Arica. On July 28 (Peru's independence day), 1929, the treaty was ratified, and a month later Tacna was formally surrendered to Peru. Thus was finally ended the vexatious "Question of the Pacific," which for nearly half a century had been a source of ill will between Chile and Peru and a standing menace to the peace of South America.

Some time before this Peru had made territorial adjustments with other neighbors. The boundary treaty signed with Bolivia in 1909 has been mentioned (see page 558). In the same year an agreement with Brazil defined the limits between the two countries as an irregular line running from near the source of the Acre, a branch of the Purús River, to the Javari. By this settlement Peru gave up a considerable tract of territory which she had once claimed. As has already been stated (see page 512), the long-vexed boundary dispute between Peru and Colombia was ended by a treaty ratified by Peru in 1927. The question of the Ecuadorean boundary is still unsolved; but prospects for adjustment improved early in 1929, when Peru began to show willingness to make concessions in the interest of an agreement.

When the War of the Pacific ended, Peru was in a wretched plight, a plight soon made worse by a civil war of seven months. Many thousands had been killed in the conflict with Chile, especially Indian laborers conscripted into service; a large fraction of the population had been greatly impoverished; the treasury was empty and the country was bankrupt; there was


72°
70°
68°
66°
PERU
Puno
Lake Titicaca
16°
Arequipa
La Paz
Mollendo
Cochabamba
Sama R.
TACNA
Tacna
BOLIVIA
Oruro
18°
Arica
ARICA
Lake Poopo
Sucre
Camarones R.
TARAPACÁ
Potosí
20°
Iquique
22°
Loa R.
Cobija
ATACAMA
ARGENTINA
Antofagasta
24°
CEDED TO CHILE IN 1874
Paposo
26°
CHILE
Copiapó

TERRITORY INVOLVED IN THE TREATIES ENDING THE WAR OF THE PACIFIC a staggering foreign debt; and the most valuable resources of the country, the nitrates of Tarapacá and a considerable portion of the guano deposits, had been lost in the war.

To Andrés Cáceres, military dictator from 1886 to 1890, fell the basic work of reconstruction. Under his leadership the government was organized on a more modest and economical scale, and a new revenue system was introduced which included various excises and heavy taxes on exports and imports. Though this arrangement placed a large burden upon the nation, the income provided promised to do little more than meet the current expenses of the government.

In the face of this situation the foreign bondholders, largely English, who had received no interest on their loans for many years, came forward with a plan of settlement which was accepted by the Peruvian government and went into effect in 1890. By this plan the creditors formed themselves into the Peruvian Corporation, to which the authorities of Peru transferred for a period of sixty-six years the various national railroad lines of the country, with the free use of seven ports and permission to navigate Lake Titicaca. To the corporation was also given the right to exploit Peru's remaining guano deposits to the amount of three million tons. In addition it was to receive from the Peruvian treasury thirty-three yearly subsidies of 80,000 pounds sterling each. In return for these considerations and for certain proceeds from the sale of guano which Chile agreed to turn over to the corporation in behalf of Peru, the organization undertook to free Peru of her debt of more than $250,000,000. The agreement placed the country upon such a basis as gave hopes of possible recuperation in the minimum of time, and ultimate progress.

Peru has enjoyed more peace and governmental stability in the forty-five years since the War of the Pacific than in the preceding period; yet the country has several times suffered from bloody political strife. After 1895 conditions improved somewhat and most of the chief executives were drawn from civil life, the early ones from the Civilist group. Party names —Civilist, Constitutionalist, Liberal, and Democratic—have been especially insignificant in Peru, however; personalities have dominated in governmental matters.

Unquestionably the most influential political figure of the country during the past half-century has been Augusto B. Leguía, a business man who began his political career in 1904 as minister of finance. In 1908, as candidate of the Civilists and Constitutionalists, he was made president, and during his term of four years he worked especially for the economic development of the country. In 1919, supported by the Constitutionalists, he came out against the incumbent of the presidency, José Pardo, who was candidate for reëlection by the Civilists. Fearful that Pardo would manipulate the election returns, the Constitutionalists, aided by a portion of the army, placed Leguía in control by a *coup d'état*.

Promptly thereafter the administration set about drawing up a new constitution to replace that of 1860. Under it Leguía was elected president, and has since remained in office through reëlection; but during most of the time he has exercised dictatorial powers. Under the new constitution the president was to be elected for five years, instead of four, and was not to be immediately reëligible. A responsible council of ministers was to take the place of a vice president. Though the government provided was unitary on the whole, more power than previously was given to the municipalities, and provision was made for regional legislatures (one each for the northern, central, and southern parts of the country), which had the right to enact laws to meet local needs. Although it named Roman Catholicism as the religion of the nation under the protection of the government, the new frame of government was more liberal than its predecessor in that it did not prohibit the exercise of any other religion. Following the lead of the Mexican constitution of 1917, the Peruvian one of 1919 also contained various provisions intended to protect labor and to prevent trouble from foreigners' investing money in the country and calling on their own governments to uphold their interests.

During the past third of a century Peru has made marked advancement along practically all lines and has not only recuperated from the effects of the War of the Pacific but has become established upon a sounder economic basis than that in which the war found it. A permanent contribution toward this was the adoption in 1897 of the gold standard, which encouraged industry and commerce by helping to stabilize the currency. The new monetary unit was the *libra* (at par the equivalent of the English pound sterling), which was worth ten soles.

Much attention has been given to the development of transportation facilities in the interest of economic expansion. The railroads projected by the financially reckless President Balta and worked on under him and under President Manuel Pardo have been completed by the Peruvian Corporation, and new lines have been added. Some roads were built by other companies, but these were short. The lines owned by the government and controlled by the Peruvian Corporation form more than 80 per cent of the total railroad mileage of the country. One of the most important systems is the Southern Railway of Peru, which extends eastward and northward from Mollendo. The first important unit of this line, connecting Mollendo with Arequipa, had been completed by 1870; two years later it had been extended to Puno on Lake Titicaca. Within the next few years the road was extended to a considerable distance beyond the lake, but building was interrupted by the financial difficulties which embarrassed the country, and it was not until 1906 that the road reached Cuzco. Shorter but more remarkable is the Central Railway of Peru, which runs from Callao toward the northeast and has a number of branches. In 1878, when war with Chile interrupted the building, the line had reached Chicla; in 1893, through the activities of the Peruvian Corporation, Oroya became the terminus; by the close of 1908 the road had reached Huancayo. The total length of the line is only two hundred and fifty-eight miles; but it includes sixty-one bridges, sixty-six tunnels, and twenty-one switchbacks, and reaches, at a distance of a hundred and eight miles from the coast, a height of 15,806 feet, making it the highest standard-gauge railroad in the world. These facts help to make evident the expense and the engineering difficulties encountered by Peru and other rugged countries of Latin America in their efforts to acquire adequate transportation facilities. At the present time the country has a total of about two thousand miles of railroad.

President Leguía has devoted considerable attention to improving facilities for vehicular transportation, and numerous motor roads have been completed, one of the most important being a toll line seventy-six miles long running from Oroya to La Merced. This forms a link in the chain of connections between Lima and Iquitos on the Marañón, the chief river port of the country, which is visited by Atlantic steamships making the trip of twenty-three hundred miles from the mouth of the Amazon.

In 1908 Iquitos and Lima were connected by telegraph, and during the past twenty years telegraphic communications have been so extended that nearly all important points in the country have been united by them.

During the first half-century of independence the extraction of metals was neglected, partly because the abundant guano and nitrate deposits could be exploited with greater ease. But in 1876 the government founded a school of mines in Lima with the object of fostering greater interest in this industry, and passed laws giving sound title to mining properties. Though the war with Chile delayed development, the mining of gold and especially of silver increased decidedly during the last decade of the nineteenth century. A new mining code of 1901 gave assurance to foreigners as well as to nationals and caused outside capital to be invested in mining enterprises and modern machinery to be introduced. By 1925 the annual gold output was about $3,000,000, and the silver somewhat over $10,000,000. Just at the turn of the century the exploitation of the copper deposits of the country began to attract serious attention. American capitalists secured concessions in the Cerro de Pasco region, where most of the ore has been found, and began a large-scale development of what proved one of the richest copper lodes now known to exist. By 1926 the mines worked by the American Cerro de Pasco Corporation were producing more than one hundred million pounds of copper annually, about nine tenths of the country's output of that metal.

Extraction of petroleum began on the northern coast of Peru about 1870; but the yield of the wells was small until after the beginning of the twentieth century, when a rapid increase took place. In 1928 the production was almost twelve million barrels, and Peru ranked next to Venezuela among South American countries for its output of petroleum.

The forest products of Peru were exploited rather steadily after independence, especially cabinet woods and quinine. Later rubber became important; but by about 1920 most of the wild rubber was gone, and the government began to encourage rubber-growing. As a result, in the Iquitos region there developed extensive rubber plantations which sent out their product by way of the Amazon.

Though animal husbandry and the tilling of the soil have always played an important part in the economic life of Peru, the government did hardly anything toward modernizing these industries until after the opening of the twentieth century. In 1902 a school of agriculture was founded near Lima, and later an experimental farm was established in the highlands near Cuzco; the latter, in particular, has done a great deal toward improving the wool yield of Peruvian sheep (of which there are millions in the southern highlands) through crossing the inferior native breeds with British stock. The experimental farm has also greatly increased the length of the alpaca's silky hair through selective breeding. This animal and the llama continue to be raised in the mountainous sections, chiefly by the aborigines; it is estimated that there are about fourteen hundred thousand of the one and half as many of the other. Less has been done to improve the quality of horned cattle, and the million and a half or so found in the country are of a generally poor type.

About half the yield from tillage crops in Peru comes from soil under irrigation; the best part is along the coast and is watered from the snow-born streams from the Andes. Sugar cane is the most important crop; it is grown for the most part in the north. Cotton, second in importance, is largely produced in the southern coastal region. Both crops have shown rapid increase during the last twenty years. Another expanding tillage product is rice, cultivated chiefly in the northwest. In the temperate uplands potatoes, barley, and wheat are grown. Wheat is a comparatively new crop, and is now being produced on such a scale as enables the nation to cut down the amount of imported wheat and flour.

Most of the manufacturing in Peru is limited to the working up of food products and the making of silverware and of cotton and woolen textiles. Until after the middle of the nineteenth century all the weaving was according to the primitive manner, but in 1861 a modern woolen loom was introduced, and in 1874 one for working up cotton. Then the manufacture of textiles increased fairly steadily until after the opening of the new century, when more rapid growth began; but both the woolen and the cotton cloth are of coarse quality.

The country as a whole still imports most of the manufactures used and sends out raw materials, chiefly gold, silver, copper, petroleum, guano, rubber, medicinal herbs, sugar, hides, and wool from both sheep and alpaca. Most of the alpaca wool of the world comes from Peru.

No accurate census of the country has ever been taken, but the estimated population is about five million. Perhaps half this number is made up of aborigines, chiefly Quechua-speaking in the highlands, though there are some Aymarás; the mestizos, or *cholos*, may form a third of the whole; probably 5 or 6 per cent have Negro blood, and about the same fraction are pure whites; about 2 per cent are Mongolians—mostly Chinese, though there are a few Japanese. As elsewhere in South America, the whites form the dominating, landholding class; the cholos are rather timid aspirants to a middle position; and the darker elements make up the great mass of humble laborers, many of whom are landless debt serfs, despite repeated efforts of fair-minded national leaders to improve their condition. A law of 1916 made a new attempt to free the Indian from the tyrannical bondage from which he had suffered, through prohibiting forced labor and the detention of the laborer and his live stock for debt, setting a minimum wage of twenty centavos a day, and placing the Indians under the protection of the minister of finance. A growing public conscience on the subject of the wrongs done the Indians has prevented these corrective measures from being entirely ignored by selfish employers.

During the last fifteen years much has been done toward improving sanitary conditions in Peru, and through this the Indian has benefited as well as the white. The first important step was taken by José Pardo, after he became president for the second time, in 1916. Dr. Henry Hanson of the sanitary department of the Panama Canal Zone was asked to make a health survey around Lima. This was done, and a campaign followed against mosquitoes which quickly drove yellow fever from the country and reduced the amount of malaria in the coast ports. Shortly afterwards President Leguía took another step in the direction of modernizing the country along hygienic lines by commissioning the Foundation Company of New York to pave and introduce scientific sanitary systems into more than thirty cities of Peru. This work is now under way. Among the cities already supplied with up-to-date sewage plants is Cuzco, the ancient Inca capital, which until 1927 was still medieval in its standards of hygiene.

After the war with Chile little was done for Peruvian education until José Pardo's first administration, which began in 1904. Efforts were then made to extend primary education by taking it away from the municipalities and placing it under control of the national government and by devoting much larger funds to its support. German and Belgian educators were invited to the country to take charge of the secondary schools, which in 1908 numbered but twenty-three. Professional training was provided by the universities of Arequipa, Cuzco, and Trujillo, and of San Marcos in Lima. Under the second Leguía régime the influence of the United States began to be dominant in Peruvian education. In 1921 expansion of the public schools began, and reorganization on American models by experts from the United States. Many young people were sent abroad to study at government expense. Despite the educational progress recently made, however, there were but 272,490 pupils in the primary schools of the country in 1928 and the great majority of the population was still illiterate.

The second Leguía administration also made a point of fostering interest in Peruvian archæology; and a scientist from the Smithsonian Institution in Washington was placed in charge of the National Archæological Museum in Lima, which now has an extraordinarily fine pre-Incaic and Incaic collection, by far the best in the world. Later Dr. Julio Tello, the Peruvian archæologist, became curator of the museum.

XXVI

CHILE

> . . . las sangres de Valdivia y de Caupolicán,
> confundidas en una como regia alianza,
> dan al mundo una raza de soberbia pujanza.
>
> GABRIELA MISTRAL, *Ercilla*

CHILE passed more quickly through the caudillo stage of political development than any other of the Spanish-American states and, through gaining governmental stability, was the first to be placed firmly upon the road to economic and intellectual progress. Various influences contributed to this. One of these was geographic unity, which made for national solidarity. The country was shut away from its neighbors by ocean, desert, and mountain ranges, which formed a fairly effective quarantine against the political fevers which long raged near its frontiers. Another factor was the fierce, liberty-loving character of the Araucanians, who, unwilling to be the unrewarded participants in the political game of follow-your-leader, preserved a form of armed neutrality toward the early factional struggles which centered about the capital. Most important of all was the fact that Chile had a strong landed aristocracy, made up of creoles who held themselves to be the political heirs of Spain. This class was large enough to be very influential from the first, and had sufficient wealth to be opposed to economically ruinous wars; hence it early gained political control and proceeded to govern to suit its own interests. This was possible because much of the rest of the population were either tenants of these land barons or their servile laborers, and in either case were rather at their mercy. The clergy coöperated with the aristocracy in their efforts to preserve the peace which made for prosperity, and enjoined humility and resignation upon those in the humble walks of life.

THE DICTATORSHIP OF BERNARDO O'HIGGINS

Chile was especially fortunate in its first executive, Bernardo O'Higgins, who was made "supreme director" in 1818. O'Higgins was a creole of Irish-Spanish blood and British education. He had had wide experience, could think clearly, and was well aware that the Chileans were not ready for democracy. But he felt that popular rule was an ideal toward which leaders should work; hence, while maintaining practically autocratic control, he promptly began the long training of the population which he knew was necessary to prepare it for republican rule.

The first need of the country was the restoration of law and order, for life and property were very unsafe because of the breakdown of authority during the struggle for independence. The situation was quickly improved through the creation of a system of rural and city police to catch brigands and of special courts instructed to try and sentence them within twenty-four hours. Furthermore, Santiago was supplied with street-lighting and with a squad of night watchmen.

In the interest of economic development the dictator encouraged agriculture, especially by the completion of the Maipo irrigation canal, which transformed the arid region about the capital into stretches of green fields. He sought also to stimulate local trade by building market places in Santiago and to foster foreign commerce by removing various restrictions.

With the special aim of training for democratic government he gave much attention to education. The Instituto Nacional, founded in 1813 but closed during the war for independence, was reopened, as was also the public library. Lancasterian schools were started in Valparaiso and Santiago to help toward supplying the need for primary education in those cities, and a secondary school, or *liceo*, was founded in La Serena; town councils and religious orders were instructed to open and maintain primary schools; the press was encouraged as an educational medium; and the reading of foreign books and periodicals was fostered through exempting them from import duties and permitting them to circulate in the country without postal charges.

Some of O'Higgins's reforms proved very unpopular. His abolition of *mayorazgos*, or entailed estates, roused much resentment among the aristocracy; by his prohibition of burials in the churches and authorization of a cemetery for dissenters in Valparaiso—where there were many foreigners—he incurred enmity among the clergy; and his elimination of cockfighting, bullfighting, and other amusements characterized by cruelty and accompanied by gambling and drunkenness stirred up popular indignation in general.

But more serious was the friction which developed between O'Higgins and various other leaders due to personal jealousy on the part of the latter, to conflicting political principles, and to the fear of some that the dictator planned to remain permanently in control. Partly to allay suspicion, O'Higgins had a convention called in July, 1822, to draw up a constitution, but he rather made the situation worse by trying to control the election of delegates to the gathering.

This meddling was especially resented in the south, where the national economic policy was considered disadvantageous and the soldiers' pay was far in arrears. Hence, before the new constitution—which sanctioned ten more years of dictatorship—could go into effect, O'Higgins was faced with serious difficulties raised by his enemies. In October, 1822, the south, headed by Ramón Freire, the military governor stationed at Concepción, declared independence of the rest of the country and denounced as illegal the acts of O'Higgins's constituent congress. Almost immediately afterwards a similar uprising took place at Coquimbo in the north. With both ends of the country aflame with revolution, the middle portion was hardly likely to remain under the control of the existing administration. Early in January, 1823, the capital turned against the dictator and an open cabildo asked him to resign. After a short delay, O'Higgins handed his power to a provisional junta and went into exile.[1]

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[1] He took up residence in Peru, the government of which gave him an estate for his support. The rest of his life was spent in Peru, where he died in 1842, when he was preparing to visit Chile after a general amnesty and a special invitation from the Chilean government to return.

FEDERALIST THEORIES AND POLITICAL CHAOS

The seven years that followed O'Higgins's departure proved to be the most turbulent period experienced by Chile. Freire lost no time in assuming control in Santiago, where he maintained himself for most of four years. One popular act of his régime was the expulsion in 1826 of the Spanish forces from the Chiloé Archipelago, which they had held until then, and the incorporation of the territory with the rest of the country; but in general the policy of Freire was no more pleasing than that of his predecessor. The new constitution, adopted in 1823, was oligarchic and paternalistic and was disliked from the first. Equally unpopular were Freire's financial measures, which aimed to replenish an empty treasury and to secure funds for the payment of interest on a loan of $5,000,000 contracted by O'Higgins in London. The monopoly of the sale of tobacco, foreign liquors, tea, and a few other commodities, formerly held by the government, was handed over to a large business organization headed by Portales, Cea, and Company, with the understanding that the service on the loan should be met by it. Unfortunately the arrangement not only stirred feeling against the Freire administration but also proved a business failure. In less than two years it ended because the profits made by the company were not sufficient to meet its financial obligations. To a greater degree than did O'Higgins, Freire roused resentment from the Roman Church, for he expelled the bishop of Santiago, who was strongly royalist in sentiment, suppressed a number of convents and confiscated their property, and placed serious restrictions upon the activities of various others. This caused the clergy to give strong aid and comfort to Freire's opponents.

Meanwhile the country was in a chronic state of anarchy, which some hoped to end by that panacea of amateur politicians, a new constitution; consequently in July, 1826, a constituent congress assembled and set to work. The gathering was dominated by those desiring a federalist system, which was now favored by Freire, and the United States constitution was used as a model. To these constitution-makers, as Luis Galdames puts it, federalism was not the fruit of necessity but "an illusion and a doctrine"; and to suit their theories they carved up the country into eight provinces, in anticipation of the constitution which they planned to frame.

But the federalist document was never completed, for within a few months after the congress had begun its sessions the country had reached an almost incredible turmoil of anarchy. Part of the trouble was caused by quarrels between provinces over boundaries, and by the ambition of cities to become provincial capitals and of politicians to fill the important offices. Also, government in general had broken down. Santiago, with a population of sixty thousand, was reported to have had about five hundred murders in 1826. The Araucanians, stirred up by Spanish refugees, were on the warpath, robbing, kidnaping, and murdering whites on the southern frontier; in various parts the soldiers, long unpaid, were in a state of mutiny, and in some cases it was hard to distinguish between them and the bandits who swarmed throughout the country. Furthermore, agriculture and industry were languishing, the treasury remained empty, and in some sections the people were starving.

Early in 1827 a determined colonel of a Santiago garrison invaded the hall of congress on horseback accompanied by a group of soldiers and, with pointed guns, ordered the constitution-makers to disperse. They scattered at once, but reconvened in a few days. The experience, however, seems to have inspired grave doubts in the minds of some of the political theorists as to the efficacy of federalism for Chile's ills; and later in the year the constituent gathering ended without having accomplished its work. At about the same time Freire resigned, giving place to the vice president, Francisco Antonio Pinto.

Now there was a new attempt at constitution-making. During the discussion into which the country was plunged while the document was being drawn up, there developed two well-defined political parties, or factions, which long survived: Conservatives, made up of clergy, rich landholders, and the remnants of the colonial nobility, who desired a centralized, oligarchic government; and Liberals, composed of the humbler element interested in politics, who favored democratic federalism and radically progressive measures. The latter commonly referred to their opponents as *Pelucones* (Big Wigs) and were in turn called by them *Pipiolos* (Greenhorns). The new constitution, which showed a reaction against extreme federalism, was adopted in September, 1828, and the next year Pinto was elected president under it. There was no opportunity to test its qualities, for within a few months the Conservatives had revolted, under the lead of Joaquín Prieto, a defeated candidate for the vice-presidency. Freire led the Liberal forces in defense of the administration, and for some months the country was again rent by general civil war. On April 17, 1830, the contest ended in a decisive victory for the Conservatives on the banks of the Lircay River in the north.

THE PERIOD OF DOMINATING EXECUTIVES

The battle of Lircay marked the end of federalistic Liberal anarchy in Chile and definitely ushered in an era of political stability and comparative peace under centralistic Conservative domination. To secure a basis for a new order, the victors called a carefully selected convention to "reform and supplement" the constitution of 1828. In the committee appointed by the gathering to prepare a draft of revision were two leaders largely responsible for decisions made by the convention as a whole. One, Mariano Egaña, a man of broad culture who had just returned from five years of diplomatic service in Europe, was very distrustful of popular control and presented a plan favoring a sort of "monarchical republic." He was the Alexander Hamilton of the gathering. Opposed to him was Senator Manuel José Gandarillas, a talented journalist who had for a time been in Freire's cabinet and had taken the lead in calling the convention. Although he realized that the ignorance and inexperience of the population made necessary a strongly centralized government, he felt that it should be definitely democratic-republican in form. The Chilean constituent assembly, like the

Philadelphia convention of 1787 called to revise the Articles of Confederation, finally ended by drafting a new organic law; and the Chilean constitution, like that of the United States, represented a compromise between the extreme views held by the most influential leaders. That the fathers of the Chilean frame of government which was adopted in 1833 did their work well is apparent from the fact that, with a few amendments, it remained in force for ninety-two years.

This constitution provided for an aristocratic centralized government with property qualifications for high officials and a definite national restraint upon even the smallest political unit. The two-house congress was left rather weak by the constitution and was practically limited to legislative functions. The chief executive, to be known officially as the "president of the republic of Chile," was to be chosen indirectly for a term of five years and might be immediately reëlected for a second term but not for a third. To him was given much power; for though he was to be aided by administrative secretaries and advised by a council of state, these officials were to be appointed, and removable, by him. Furthermore, the president had the right to exercise a suspensive veto of measures passed by congress, to prorogue that body for as long as three years, and, in case of foreign war or internal disturbance, to declare the country or any part of it in a state of siege, with suspension of constitutional powers and guaranties. The president likewise was empowered to appoint, with the approval of his subservient council, the members of the supreme court, who held office for life or during good behavior. The intendants of the provinces were also named by the chief executive and were to serve as his agents, controlling directly or indirectly all minor executives within their jurisdiction.

Suffrage was granted to all married men over twenty-one years old and unmarried men over twenty-five who could read and write and had a certain minimum income or property. The literacy qualification was not to be required before 1840, however. In harmony with the aristocratic bent of the dominant party, entailed estates, abolished by Bernardo O'Higgins, were restored by the constitution of 1833. Roman Catholicism was declared to be the religion of the State, and the public exercise of other faiths was prohibited; but through his appointive power and other rights the president was given considerable control over the clergy.

Before the constitution of 1833 went into effect the Conservative régime had begun. Prieto, the hero of Lircay, was made president in September, 1831, and was confirmed in office under the new constitution. He was reëlected in 1836. Yet during Prieto's first term, and even in the year preceding it, the dominating personage in Chilean politics was not the president but Diego Portales, one of the most striking figures in the country's history. Portales was a member of Portales, Cea, and Company, the monopolistic firm already mentioned. He became interested in politics because he wished to produce conditions conducive to peace and labor, necessary to commercial prosperity. His main business establishment was in Valparaiso, and he never lost touch with it, though his political activities were great for a time. In 1830, after the victory of Lircay, he assumed the portfolios of the departments of war, navy, foreign affairs, and the interior under the Conservative provisional government. He soon established a reign of law and order, and this helped to start the country upon the path of economic progress and educational enlightenment again. He could have been president, but he refused the office and favored Prieto for chief executive. In July, 1832, after Prieto's administration was well launched, Portales resigned from the cabinet; but he was elected governor of Valparaiso and gave the city a strong, progressive rule.

In 1835 he returned to national office as minister of war and had a short, troubled period of public service. Freire, exiled in 1830, had been in Peru plotting to regain control in his native country. In July, 1836, he sailed with two Peruvian war vessels to the Chiloé Islands, which he planned to make revolutionary headquarters. He was defeated in battle and soon afterwards imprisoned on Juan Fernández Island through the efforts of the energetic Portales; but the incident caused strained relations with Peru and made the minister of war desire the destruction of the Peru-Bolivian Confederation of Santa Cruz. Accordingly war was declared against the neighboring state in November, 1836; but it was not popular among the Chileans, who felt a growing resentment toward the dictatorial influence of Portales. Feeling against him was much increased soon after hostilities opened by the fact that he induced Prieto, in the interest of greater national support of the war, to declare the country under martial law. Conspiracies and uprisings followed; and the minister of war fought them by instituting a reign of terror. While trying to restore order he was assassinated by mutinous soldiers in June, 1837. Many regarded his death as a national disaster; but it helped to popularize the war, for some believed —probably without justice—that the murderers were incited by Santa Cruz. As soon as the latter had been overthrown in 1838 through the generalship of Manuel Bulnes, Prieto restored constitutional liberty and also helped to soften factional bitterness by proclaiming a general amnesty of political exiles.

Another man of outstanding ability who served under Prieto was Manuel Rengifo, for a time minister of hacienda. Like Portales, he was a merchant, and he applied sound business methods to the disordered finances of the nation which Prieto had inherited from the Liberal régime. He sharply cut down expenses, eliminated graft as fully as possible, and readjusted the sources of income, making a more just distribution of taxes and drawing up a new tariff law with protective features. One reform of special importance was the abolition of the alcabala on agricultural and industrial products. Plans were launched for developing a Chilean merchant marine, and, in anticipation of increased shipping, large warehouses were built in Valparaiso. Rengifo's methods were successful, and in five years the national income was increased from 1,500,000 pesos to 2,500,000. Arrangements were also made for reduction of the public debt, which totaled 10,000,000 pesos when Rengifo took charge, much of the sum being due to long arrears in payment of interest.

The material progress of the country was given a serious setback in 1835 by a heavy earthquake and tidal wave which wrecked all coastal cities and some in the interior from the

Maule River to the Bio-bío. Shortly afterwards came the struggle with Freire and the war against Santa Cruz; these likewise served to handicap economic development.

But with the restoration of peace came the revival of old enterprises and development of new ones. Silver-mining, owing to the discovery of rich ore near La Serena and Copiapó, soon brought many times the returns of colonial days. In the decade of Prieto the copper mines likewise showed a much increased output, and rich veins of coal were discovered and began to be worked in the Talcahuana region. Tillage of the soil was stimulated by the introduction of new farm machinery under government auspices and by the founding of the National Society of Agriculture in 1838. New roads were built, to the general economic benefit of the nation. To foreign commerce was given a strong impulse through the starting of a steamship line between Valparaiso and Callao, just as Prieto's second term closed, by an American, William Wheelwright. This was the first steam-navigation route on the Pacific coast of South America. Later an English company was formed to operate vessels between the two ports, and soon there was regular steam transportation between Valparaiso and Panama.

Though the Prieto administration created a special department of education in the government, and established schools of engineering, pharmacy, and medicine, it did very little toward the expansion of popular education. But during the Prieto decade valuable intellectual stimulation came to the country through the influence of scholarly foreigners, who were welcomed by the government. One of these was the French naturalist Claudio Gay, who was commissioned by Portales to make a descriptive survey of the natural products of the country, a task which took twelve years to complete. More distinguished was the Venezuelan Andrés Bello, who arrived in 1829 to make Chile his home and was director of a short-lived school known as the Colegio de Santiago. His writings ranged from classical poetry to a profound treatise on international law which attracted the attention of foreign scholars.

In 1841 General Bulnes, commander in chief of the armies against Santa Cruz, succeeded Prieto as president, and was reelected in 1846. Like Prieto, he followed a conciliatory policy, even appointing a few Liberals to office; but on the whole he was very cautious and conservative, and his moderation made possible ten consecutive years of peace, an experience new to independent Chile. The nation took advantage of it and made very decided advancement along all lines. The department of hacienda was in good hands, for Manuel Rengifo, who had been absent during Prieto's second term, was again in charge. The debt service was regularly met, and business transactions were made easier through displacing the clumsy Spanish system of weights and measures by the metric. Foreign commerce continued to increase, and Chilean standards of living were improved by a lowering of the tax on imports.

Under President Bulnes the country began to expand its settled area and to look to the holding down of its unmarked frontiers. In 1843, in accordance with a long-discussed plan, a Chilean expedition built a fort—called Bulnes—on the north coast of the Strait of Magellan, and there raised the national flag. Four years later was founded at the same place the town of Punta Arenas. So far during Chile's period of independence the foreign immigration had been but slight, though a scattering from various nations had come in, especially Spaniards and English, and the latter had begun to have an influence upon the life of the nation quite out of proportion to their numbers. In 1843 the government announced a favorable immigration policy, and agents were sent to Europe to induce Germans, in particular, to come to the country and to settle in the south. The first settlers, eighty-five in number, arrived in 1850. At the outset they encountered serious hardships because the government had not made adequate provision for them, and for a time no land was to be had owing to the fact that, in anticipation of the influx, speculators had bought up territory from the Indians. But the difficulties were ironed out; and during the next sixteen years about fourteen hundred Germans settled in the forest lands of the south—first at Valdivia, and later on the shore of Lake Llanquihue and at Puerto Montt on the Pacific, twenty miles to the west of the lake. The settlers gave to the southern part of the country a steadying example of industry, respect for law, and intelligence which contributed to national progress.

After 1848 there was considerable draining away of Chile's population because of the gold rush to California; but the loss was probably far more than counterbalanced economically by the great demand in California for Chilean food products, especially wheat and flour.

The Bulnes decade is notable for the great progress made by Chile in the field of intellectual development. An extensive educational program was undertaken by the minister of education, Manuel Montt, who—as the Chileans put it—was a "son of his own works" (*hijo de sus obras*), or self-made man, of unusual ability. In 1842 he founded in Santiago the first normal school in the country and placed at its head Domingo Faustino Sarmiento, an exile from across the Andes who later became president of Argentina. At the time there were not more than fifty primary schools in the country, in which were enrolled about three thousand of the two hundred thousand children of school age; and the instruction was very poor. Manuel Montt founded about three hundred new schools and, through his normal-school graduates, did much toward improving elementary education. Secondary training also was extended and reformed, with the Instituto Nacional—of which Montt had been director when called to Bulnes's cabinet—as the model for the country. Following a suggestion made years before by Mariano Egaña, in 1842 Montt had a University of Chile chartered, and the next year it was opened with five different faculties and with Andrés Bello as rector. Other special institutions founded under Montt's lead were a school of agriculture with a model farm, a school for training in arts and crafts, a conservatory of music, and a school of architecture and painting.

During Bulnes's second term restlessness and resentment grew among the Liberal opposition. This was because of new laws that provided severe punishment for publishing statements unfavorable to the government and gave intendants and governors greater local authority, thus strengthening presidential control. It was evident that the dominant Conservatives meant to guard well against loss of position. By this time many of the original Liberals were dead and their places were to some extent taken by young men who were especially energetic in demanding freedom of the press and of suffrage and other reforms. The most influential leader of the group was for a time the intellectual José Victorino Lastarría, but much life and direction were given its activities by Francisco Bilboa, who had been in Europe during the republican revolutions of 1848 and was strongly influenced by socialistic ideas gathered in France. Peonage and other social injustices existing in Chile roused him to action, and in 1850 he organized the Sociedad de la Igualdad in the interest of bettering the condition of the poor and humble. *El Amigo del Pueblo*, with Eusebio Lillo as its editor, was founded about the same time for spreading the propaganda of equality.

While these radical developments were taking place it became evident that President Bulnes meant to support for his successor Manuel Montt, his most influential minister, against whom there was much Liberal feeling, as Montt was looked upon as the political heir of the hard, dictatorial Portales. Hence the opposition, led by Bilboa, began a strong fight against Montt's candidacy. The administration retaliated by declaring a state of siege, suppressing the radical society, and exiling its leaders. In April, 1851, the Liberals attempted an uprising, but were quickly suppressed. In the election which followed a little later Montt won by a large majority owing to administration control over local political units. The Liberals, declaring the election illegal because of official intervention, revolted in September, 1851, under the leadership of their defeated candidate, José María de la Cruz, intendant of Concepción. It took a hard struggle to put down the uprising, and about four thousand lives were lost before it was accomplished. Montt granted amnesty to all the insurgents.

Manuel Montt, like his Conservative predecessors, served two terms, and his decade showed a continuation of the steady national progress marking Bulnes's administration. During the first few years agriculture and commerce expanded very rapidly to meet the needs of California's swollen population; but after the Panama railroad was completed in 1855 competition from the eastern part of the United States caused a sharp drop in the prices which Chilean goods would bring in California markets. The economic expansion of the country was made possible partly by the development of modern methods of transportation and communication begun during the Montt decade. In 1851 was opened the first railroad in Chile, a short line built by William Wheelwright between Caldera and Copiapó. A little later a company organized by Wheelwright and aided by government funds began a road between Santiago and Valparaiso, which reached Quillota before Montt went out of office. Another line, intended to unite Santiago with Talca, was also begun, and telegraphic lines were built between a number of Chilean cities.

A national census taken in 1854 showed the country to have a population of nearly fifteen hundred thousand and was of aid in extending the educational work begun by Montt under the Bulnes régime. During the presidency of Montt more than five hundred public primary schools were founded, and a number of secondary and technical ones, including another normal school. Public libraries were also opened in various towns.

A critical spirit became more general in the country as a result of the educational revolution, and made itself felt in the attitude toward the Church. Already in the Bulnes decade the ecclesiastical stamp had begun to disappear from national life, and the daily *Mercurio* had shocked many by suggesting the desirability of religious tolerance for Chile. Legislation showed the same trend, especially that giving the government more authority over the clergy. In 1856 came a significant conflict between President Montt and the archbishop of Santiago, originating with the expulsion of a sacristan by Church authorities. At first the quarrel was limited to the Church itself; but soon an appeal was made in behalf of the sacristan to the national supreme court, which decided in opposition to the expulsion. Against this the archbishop protested, as a lay meddling with spiritual matters; to which the court replied by threatening to banish the archbishop, and it was upheld by President Montt. The withdrawal of the complaint to the supreme court, which had been made by two canons, ended the immediate difficulty, but the incident estranged the clergy from the Montt administration and also many strongly conservative persons who had been its supporters.

Another event of Montt's decade showing signs of a coming change was the abolition of entailed estates. The Chilean aristocracy, based upon wide acres and blue blood, was obviously in danger of losing its monopoly. It was being crowded out by a new urban upper class formed of wealthy merchants, outstanding professional men, and leaders in the world of scholarship. The emerging aristocracy was more liberal than the old, and was destined to have an interesting influence upon the election of 1861.

As just stated, the more conservative among the Conservatives—that is, the *Pelucones*—turned against Montt in 1856 because of the Church quarrel; but the more moderate members of the party, made up to a considerable extent of the new aristocracy, supported him, as did the more conservative portion of the Liberals. Adopting as their slogan "Liberty within order," these two groups of Montt adherents united to form what they called the National party; but by their opponents they were known as the *Montt-Varistas*, named for the head of the group, Antonio Varas, a man of somewhat reactionary reputation whom Montt had made his chief minister and evidently intended to make his successor in the presidency. In consequence of this realignment the radical Liberals and the out-and-out Conservatives in the national congress found themselves in the opposition, and in 1857 they effected a Liberal-Conservative fusion for the purpose of defeating the administration plan for the presidential succession. Here was a case of extremes meeting: Montt was too conservative to suit the radical Liberals and too liberal to satisfy the clerical Conservatives. Since the parties to the fusion were quite opposed in political principles, they could unite only in accusing the government of corruption and in demanding "administrative purity."

The anti-Varista movement launched by the coalition of extremes spread rapidly, stimulated by the energetic pens of Benjamín Vicuña Mackenna and other bold Liberals. In January, 1859, an insurrection took place in Copiapó, and it was quickly followed by uprisings in other parts, especially the south. The revolt was put down after considerable fighting, and the defeated leaders were exiled; but the strong feeling manifested against Varas by the movement led him to withdraw his candidacy in order to save the country from further bloodshed. Thereupon Montt gave his support to José Joaquín Pérez, a Nationalist of moderate views, who won the election. With the accession of the new president the era of conservative autocracy ended in Chile, and there began a ten-year transition period between the old order and a coming Liberal rule.

Pérez, who possessed wide political experience, was mild and serene of disposition and conciliatory in policy; hence he formed a coalition cabinet of members from each of the three political groups, and proposed to his first congress a general amnesty law, which was passed. For a very short time all was politically harmonious; but soon differences developed, and the Nationals and extreme Liberals in congress turned against the administration. The Liberals, who now began to call themselves Radicals, insistently and emphatically demanded constitutional reform. The agitation was peaceful, however, and Pérez made no use of martial law during his ten years as chief executive.

The Araucanian Indians, who had twice warred against the Montt administration, gave almost constant trouble to Pérez through raids into the white settlements and stubborn resistance to the government troops sent against them. After an uprising in 1859 the government had adopted the policy of permanently occupying the Indian country through the erection of forts and the building of towns within its borders. After repeated campaigns against the Araucanians the Pérez administration carried out the idea more fully by constructing a line of forts along the Malleco River to protect the new cities which were rising in the south. But this failed to subdue the doughty aborigines, who were destined to give the Chileans still more trouble.

Meanwhile the country had got into trouble with Spain through uncomplimentary demonstrations made by Chilean citizens outside the Spanish legation in Santiago after the seizure of the Chincha Islands belonging to Peru. The Chilean government refused to give the apology and salute of twenty-one guns demanded by Spain, and late in 1865 vessels of the latter blockaded a number of Chilean ports and bombarded Valparaiso. The next year this quarrel developed into the war of the South American quadruple alliance against Spain, which, as stated in Chapter XXV, ended after a few months of fighting; but some years passed before peace was formally established.

Despite these disturbances Chile continued to progress. The railroad between Valparaiso and Santiago was finally completed in 1863, through the work of Henry Meiggs, at a total cost of 12,000,000 pesos, a sum much greater than was at first expected. The lines intended to connect Santiago and Talcahuano advanced toward completion, and various shorter roads were built. In May, 1868, the first Chilean steamer sailed for Europe by way of the Strait of Magellan, in connection with a line well subsidized by the government. These developments in transportation gave general economic stimulus to the country, especially to agriculture, which received a more modern trend through a fair held in Santiago in 1869 with the special object of introducing new farm machinery and better breeds of live stock. The old mining activities continued, and nitrate fields in the north began to be worked. In the north also were recently discovered guano deposits which became a new source of revenue to the government through being exploited under contract by private companies.

Educational advancement continued and showed itself especially in the reform of the secondary-school curriculum, accomplished under the direction of the historian Diego Barros Arana, principal of the Instituto Nacional. The changes involved the introduction of various branches of natural science, more attention to history (especially that dealing with the New World), and the teaching of the secondary-school courses by specialists.

Meanwhile the Liberals and Radicals had been laboring to some advantage in the interest of various reforms. In the congressional session of 1865 the question of religious tolerance was pushed strongly despite clerical opposition; and an amendment to the constitution was secured giving non-Catholic groups the right to establish schools for the education of their children in their own faith and to worship within buildings belonging to private individuals or associations. Thus religious toleration in its essentials was guaranteed by the State. Another victory of the Liberals was a constitutional amendment, adopted in 1868, which ended the decennial presidential control by prohibiting the chief executive from succeeding himself.

The first president to serve under the amended constitution was a Liberal, Federico Errázuriz, who had taken part in the insurrection of 1851 and later served in Pérez's government. By means of aid from Pérez, Errázuriz won the election of 1871.

Now came a number of sweeping reforms. A measure was adopted somewhat restricting the power of the president, and another providing for minority representation in the election of members of the house of deputies. More important were laws restricting the power of the Church, one of which stipulated that decent burial should be provided for Protestants in sections set apart in the public cemeteries, which were under control of the Roman Church. This was resented by the Catholic clergy, but not as much as was the statement made in the penal code promulgated in 1874 that churchmen should be punished for determined crimes. This so roused the archbishop of Santiago that he solemnly excommunicated the members of congress who voted for the new code. Nevertheless the next year congress passed a law which specifically declared that the clergy should be tried in lay courts for all civil and criminal offenses.

During Errázuriz's term a reform of a different sort took place in Santiago under the direction of its distinguished intendant, Benjamín Vicuña Mackenna. The capital was modernized and beautified through the widening of streets, the erection of public buildings, and the transformation of Santa

Lucía Hill from a dumping ground where "heretics" had been permitted to bury their dead into a unique and charming park.[1]

The successful presidential candidate in 1876 was, as usual, the one having official backing. This was the Liberal Aníbal Pinto, son of the Francisco Pinto who succeeded Freire in the presidency. His was a troubled term. When he came into office the country was suffering from an economic depression which was rather world-wide in its scope, but was aggravated in Chile because of crop failures and of a serious fall in the price of copper. A treasury deficit was imminent; and soon came a money crisis caused by the drain of gold and silver currency to Europe to meet financial obligations. In 1878 the government began to issue inconvertible paper money. Owing to the currency situation the cost of living increased greatly, and for some years times were hard in Chile.

Before the nation recovered from the economic crisis a more serious diplomatic one developed which plunged it into the War of the Pacific (see pages 555 and 556). The conflict was very expensive in lives and money, but Chile reaped large returns for her financial expenditure through the rich nitrate lands which she wrested from her defeated foes.

While victorious Chilean armies were occupying Lima an election took place whereby Pinto was succeeded by his minister of foreign affairs, Domingo Santa María, an extreme Liberal who had twice been banished for revolutionary activities. To Santa María fell not only the task of negotiating a treaty of peace with Peru and the beginning of reconstruction but also the solution of some problems hanging over from ante-bellum days. One of these involved the Araucanians, who had taken advantage of the withdrawal of troops for the War of the Pacific to invade and devastate a considerable area occupied by whites. After the fall of Lima veteran troops were sent south and quelled the aborigines so effectively as to end all further trouble from them. These brave, liberty-loving people were not utterly crushed and ruined by the Chilean authorities, however: sufficient land was left them for their support, and they were permitted to live under their local laws, with protection from the national government. Later they were given representation in the Chilean congress. But the Indian country, as such, was wiped out. The land left to the aborigines consisted of scattered patches; Temuco and other new towns were built in the heart of the region to the south of the Bio-bío; and soon the ancient Araucania was crisscrossed by railroads and telegraphic lines.

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[1] After the remains of the non-Catholics had been removed to the public cemetery for decent burial, Vicuña Mackenna had the spot where they had lain marked by a memorial statue dedicated to the "expatriates from heaven and earth" who had been buried there from 1820 to 1872.

The ecclesiastical question, which had become delicate through recent friction, was more difficult of settlement; but the Liberals were very strong in the congress of Santa María and set boldly about stripping the Church of its special privileges. The aim of the most radical to separate State and Church was not realized, but a number of restrictions were placed on the latter. One law provided for lay cemeteries open to people of all creeds; others called for civil registration of births and deaths, and declared civil marriage legal. All these measures roused clerical resentment; and the marriage law, which was passed in 1883, stirred up an unusual fury of opposition. Families were divided by it; for the women, less educated and more pious than the men, in many cases felt that their very souls' salvation depended upon standing by the old order, which a considerable portion of the Liberal men desired to repudiate. For a time a prolonged strike against matrimony seemed to threaten. Encouraged by this situation, the clergy tried fiercely to have the law at once repealed; and the ultramontane archbishop of Santiago pronounced excommunication against the president and his cabinet and the members of congress who had supported the objectionable law. But the government was not disconcerted and the law was not repealed.

The reformers also directed their energies toward making the constitution more democratic, and succeeded in three important regards. Amendments were adopted which abolished the economic qualifications for voting, lessened the authority of the local officials (who were little more than the tools of the president), and enabled congress by a two-thirds vote to override the presidential veto in the case of bills providing for constitutional changes.

Though a reforming Liberal who denounced the political sins and shortcomings of his predecessors, Santa María was not above the customary meddling in the presidential election. Consequently in 1886 the victory went to his candidate, José Manuel Balmaceda, the minister of foreign relations; but there were bloody frays at the polls. The new president was a man of middle age, rich and cultured, who as a youth had planned to study for the priesthood, but underwent a decided change in mental outlook and had become a strong Liberal. During the twenty years preceding his election to the presidency he had filled various public offices and, as a member of Santa María's government, had played an important part in the enactment of the anticlerical legislation.

An enthusiastic biographer of Balmaceda declares that he accomplished more in his five years' term than all his predecessors combined.[1] Though this is an exaggeration, his achievements at first glance seem rather amazing because of their number. The explanation of the unusual record of the Balmaceda administration is to be found, however, less in the patriotism, intelligence, and comparative honesty which the president and his colleagues undoubtedly possessed than in the fact that, for the first time, because of the nitrate spoils coming from the War of the Pacific, the government had abundant funds for use in public improvements. Under Balmaceda the national income reached amounts far in excess of previous records. Thus, in 1886, the year of his accession, the total revenue was 37,000,000 pesos, whereas in 1890 it reached 58,500,000. The possession of more than enough for government expenses made it possible for the administration to abolish import duties on machinery, tools, and the like, which gave a marked stimulus to agriculture and other economic activities. The financial system as a whole was reformed also: taxes were more justly distributed, the last traces of the alcabala were swept aside, and the national debt was refunded. Chile was prosperous.

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[1] Julio Banados Espinosa, *Balmaceda, su gobierno, y la revolución de 1891*, Vol. I, p. 719.

A great program of public works was launched and executed. The postal and telegraphic services were widely extended; cart roads and bridges were built, and almost seven hundred additional miles of railway; various ports were supplied with wharves; the portion of the river Mapocho flowing through Santiago was canalized; and scores of public office buildings and other government edifices were erected in the provinces and municipalities.

Much was done for education also, including the founding of nearly a hundred more primary schools and of ten additional liceos (among them the first public one in the country open to girls), three normal schools, the Instituto Pedagógico for training teachers of secondary branches, and also schools for instruction in mining, agriculture, and commercial branches. A new interest was shown in moral and physical sanitation. Modern prisons were built and the penitentiary system was reformed. A superior council of health was created and given control of provincial councils, many cities were supplied with pure drinking water, and more than twenty public hospitals were constructed and given modern equipment.

But while these and other beneficent labors were being accomplished by the Balmaceda administration there had developed serious discord within governmental circles; in fact, the expenditure of vast sums of money upon public works was one of the causes of friction, for many members of congress felt that it would be far better to use some of the available funds for redemption of the depreciated paper currency and for payment upon the national debt. There was also criticism—probably with some foundation—of governmental extravagance and of the pensioning of political favorites.

Fresh resentment developed in 1890, when it began to appear that Balmaceda, despite earlier denunciation of presidential interference in elections, meant to make Enrique Salvador Sanfuentes, a cabinet minister, his successor. Though such procedure was, of course, customary and though, furthermore, presidents had, without serious criticism, often consulted their own wishes in regard to expenditure of public funds, such acts were no longer possible. With each new administration sentiment had grown in favor of further restricting executive authority, and impatience had increased against high-handed procedure on the part of the president.

What was more serious for Balmaceda was the fact that his predecessors had usually maintained a strong majority in congress, whereas his constitutional support was soon lost. After twenty years in power the Liberals had become demoralized and now formed four different factions, three of which deserted the president and joined the three conservative groups—Clericals, Montt-Varistas, and Moderates—in opposing him. By the close of 1890 only the *liberales del gobierno* (government Liberals), who received many special favors, stood behind Balmaceda.

Lastly, there was the fatal fact that, quite independently of constitutional provisions, a strong bent toward parliamentary government had grown up during the last few administrations: the majority party in congress expected the ministry to be in harmony with its views. With a congressional majority supporting the president there had been no difficulty, but trouble soon rose for Balmaceda. After his party deserted him, for almost four years he went to much trouble and made repeated cabinet changes in his effort to observe the unwritten law; but at last he became defiant and insisted upon retaining a cabinet of his supporters who were opposed by congress. Congress had as much right, he now declared, to impose ministers upon him as to prescribe what he must eat and wear. In this attitude he had the constitution on his side.

In 1890 congress retaliated by refusing to vote the budget for the coming fiscal year until a cabinet in harmony with its wishes had been appointed. This caused Balmaceda to give way and form a ministry acceptable to congress, in return for which the latter voted temporary supplies. In an extra session called to pass a regular budget bill, congress aimed to prevent the election of Balmaceda's candidate to the presidency by forcing Balmaceda to remove certain intendants from office and by securing the adoption of the Australian secret-ballot system. The president objected that congress had no constitutional right to concern itself with matters other than those for which the special session was called. That body responded by refusing to vote supplies for the coming year until the intendants were removed. Balmaceda, however, held out against the removal of the officials, and when his cabinet resigned in protest he appointed a new one to suit himself. On October 17, 1890, he adjourned his hostile congress, to which increasing encouragement in its defiance of the executive was given by the nation as a whole.

It was quite apparent that if congress were again called into session it would continue its attack upon the president and would probably undertake to impeach him instead of voting the budget necessary for the coming year. Therefore Balmaceda, on January 1, 1891, issued a manifesto declaring that in view of the situation the budget for 1890 would be in force for 1891. The pronouncement also stated the president's intention to observe the strict letter of the constitution and to ignore new parliamentary theories until these should have been enacted into law. Unfortunately for Balmaceda's position, the manifesto was plainly dictatorial, since in its stand regarding the budget it disregarded specific congressional powers.

Congress, which had met on its own initiative, responded by revolting on January 7 and publishing an act, signed by most of its members, which declared the president deposed for violation of the constitution. It also created a governing junta, placing at its head Jorge Montt, a naval officer of superior ability. To Montt was also given command of the naval forces, all of which except a few transports had turned against the president. The Congressionalists had apparently counted upon the support of the army as well, but that remained loyal to Balmaceda. Consequently, since there was a large garrison at Valparaiso, Montt did not attempt at the outset to capture that port, but went north with the fleet and seized the rich nitrate section, thus insuring adequate funds for the conduct of the war. It was a hard-fought and bitter struggle, with extreme atrocities committed on both sides, and ended in victory for the congressional element, who advanced from the north when the Balmacedist forces were scattered and, late in August, 1891, captured first Valparaiso and then Santiago. Both the cities were ruthlessly sacked.

The presidential election had taken place under Balmacedist auspices the month before, and Claudio Vicuña, more generally acceptable than Sanfuentes, was victor. Vicuña was to take his seat on September 19. On the night of the eighteenth Balmaceda, who had found asylum in the Argentine legation after the capture of Santiago by the Congressionalists, committed suicide with a pistol, leaving a note expressing a hope that his death might bring better terms for his vanquished supporters. Early in the struggle he had written, probably with sincerity, "I have no interest except in justice, no love but for the good, and no passion but for the country."

THE ERA OF CABINET GOVERNMENT

With congressional victory the period of dominating presidents ended in Chile, and there began an era involving a real test of parliamentary rule, during which the chief executive was subordinated to the wishes of the majority party in congress. Jorge Montt, who was elected first president under the constitutional parliamentary system in November, 1891, faced the work of reconstruction. Like all civil conflicts, the war had been exceedingly devastating, costing ten thousand lives and more than one hundred million pesos; and there was no indemnity, as in the case of the War of the Pacific, to compensate for economic loss. But the administration was on the whole wise in the handling of its difficult task, and hastened the healing of the national schism by granting amnesty to most of the leaders on the defeated side.

One of the most pressing domestic problems was that of the currency, which had continued to depreciate owing to large emissions of paper money by the Balmaceda faction after the war began. The government of Jorge Montt recognized the whole obligation represented by the face value of the paper currency, and in 1895, despite the protests of the debtor element, a law was passed providing for the redemption of the depreciated paper in gold at par value. The same measure established a gold standard, with the peso (equal to 36½ cents in United States money) as the unit of value.

Even before Montt's election there developed a vexatious diplomatic question with the United States over what came to be known as the "*Baltimore* affair." During the civil war in Chile the United States had shown sympathy for the presidential side, which had caused resentment among the revolutionists. Though this feeling was well known to Captain Schley of the American cruiser *Baltimore*, on October 16, 1891, he gave shore leave at Valparaiso to a considerable number of his men. In the streets of the city a quarrel began between a Chilean and one of the American sailors which soon developed into a street fight between a Chilean mob and a number of the men from the *Baltimore*. The Valparaiso police seemed indifferent to the affair and even hostile to the Americans, and the struggle ended in the deaths of two of the latter and the wounding of a number of the others. The matter was at once taken up by the United States government through James G. Blaine, Secretary of State, and rude language was used in letters written by both sides. The Chilean authorities were reluctant to acknowledge responsibility, which caused Blaine, three months after the trouble occurred, to send an ultimatum demanding an apology for the disrespect shown to the American navy and an indemnity for the wounded and the families of the dead men. The Chilean government, unwilling to risk a war with the United States, yielded, and finally paid an indemnity of $75,000; but the affair was long a cause of resentment in Chile.

Scarcely had the *Baltimore* difficulty ended before serious friction developed with Argentina over the boundary on Chile's southeastern frontier. There had been danger of trouble since Chile occupied the Strait of Magellan in the eighteen-forties, for that move had met with formal protest on the part of Rosas, the dictator of Argentina. The matter lay dormant for about thirty years, however; then serious difficulty threatened on the eve of the War of the Pacific. This was allayed by a treaty ratified in 1881, which divided Tierra del Fuego, neutralized the Strait and left it in possession of Chile, and agreed that in the mountainous section the division line should run where "the highest peaks of the Andes divide the watershed." It was this language that caused the new trouble; for Argentina interpreted it as meaning that the line should run along the crest of the Cordillera as a whole, whereas Chile held that only the highest peaks in the actual watershed were meant.

After considerable angry discussion Chile demanded arbitration of the question, to which Argentina, after a short delay, consented. For the purpose of simplifying the arbitral task, the disputed region was divided into two parts. The northern, known as the Puna de Atacama, was referred to a commission made up of William Buchanan, American minister to Argentina, and a representative from each of the disputing countries; the southern, involving Tierra del Fuego, was left to the decision of the sovereign of England. In April, 1899, a boundary was agreed upon by the tribunal concerned with the Puna de Atacama and was accepted by both governments; but there was delay in reaching a decision over the other disputed area, owing partly to the death of Queen Victoria of England before a line had been settled upon. During the period of waiting the jingoistic elements in both countries stirred up a war frenzy, and the two governments plunged into expensive military preparations. Largely through the efforts of resident British officials, some leading women, and Bishops Marcolino Benavente of Argentina and Ramón Ángel Jara of Chile, war was prevented. In June, 1902, the award was made by King Edward VII, dividing the disputed territory; it was accepted by both sides.[1]

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[1] To commemorate this peaceful settlement the famous statue known as "The Christ of the Andes," cast from melted cannon, was erected on the boundary line in the high Andes in 1904. In his speech at the dedication Ramón Ángel Jara said, "Sooner shall these mountains crumble to dust than Argentines and Chileans break the peace sworn to at the feet of Christ the Redeemer." The money for the statue was largely raised through the efforts of the women of the two countries, under the leadership of Señora Ángela de Oliveira César de Costa of Argentina.

While Chile was settling difficulties with foreign nations, the political system which had been made secure by a bloody civil war was showing serious defects when put to actual test. Cabinet crises were almost chronic and changes of ministry were very frequent. As time passed no improvement was apparent: for the next thirty years such was the normal situation, to the detriment of governmental efficiency and the neglect of important national problems. During most of the time there were in congress a half dozen or more political groups whose leaders were more interested in securing material benefits for the factional faithful than in coöperating for the general welfare; hence came the frequent cabinet changes. The president was reduced to a mere figurehead. Appointive officials, instead of representing the highest talent and individual achievement of the nation, as was usually the case before 1891, were often mediocre individuals whose main claim to consideration was party loyalty.

During this period of constitutional semi-anarchy, though progress was much slowed up it was not entirely paralyzed. The material damages caused by the civil war were repaired, and the cities from Copiapó to Talca, wrecked by an earthquake in 1906, were restored along more modern lines. Railroad-building continued, the Longitudinal Road, which ran the length of the country, being the most important. By 1914 it extended from Puerto Montt to Pintado, about sixteen hundred miles to the north. Manufacturing was given considerable impetus through the adoption of a protective policy at the turn of the century; but the nation's prosperity was still largely dependent upon mining copper, coal, and nitrates, which were being exported in large quantities.

Considerable attention was given to education, especially to the training of girls, which had long been neglected, and many liceos were opened for them. Within the generation referred to illiteracy was steadily reduced, but the inadequacy of the educational system was apparent from the fact that as late as 1922 42 per cent of the population of school age were unable to read and write.

In the second decade of the twentieth century unrest and dissatisfaction developed in Chile with reference to various matters. Educators began to suspect that the school system, which they once thought the best in the world, was seriously at fault. Economists, impressed with the remarkable material development of Argentina, pondered on the causes for Chile's economic backwardness and poverty and its unsatisfactory financial situation. In the Valley of Chile to the south of Santiago laborers were bound to the soil by debt and were too ignorant and demoralized to be seriously restless; but in the cities and at some of the mining establishments set up by foreign capitalists the common workman was articulate and was making his grievances known. The first strike of laborers had taken place in Balmaceda's term; and thereafter labor demonstrations were frequent; for though the condition of workmen had improved and wages had gone up, the cost of living had likewise increased. In the face of the display of wealth made by the newly rich nitrate millionaires the humble toilers were developing a strong conviction that national blessings were by no means justly distributed. Strikes became more comprehensive and alarming from 1915 on, and the influence of the Industrial Workers of the World (I. W. W.) began to be felt in Chilean labor circles. In consequence of much agitation a few favorable laws were passed in 1916 and 1917, including an employer's liability act and provision for one free day in seven; but restlessness among workmen was not abated, and there was much unemployment.

The financial situation grew more serious; but with the government in a chronic state of turmoil and with selfishness dominant in legislative halls, the prospect of intelligent measures which would bring relief seemed remote. Even those of former Congressionalist alignment began in some cases to look wistfully back to the days of strong presidents and to think better of Balmaceda.

That new influences were at work was evident in the presidential campaign of 1920. The candidate of the Liberal Alliance, made up of left-wing Liberals, Radicals, Democrats, and the labor element, was Arturo Alessandri, a lawyer of humble origin who made extensive promises of social and constitutional reform. The three Conservative factions, combining as the Union party, supported Luis Barros Borgoño. After a bitter campaign the balloting resulted in a hundred and seventy-nine electoral votes for Alessandri and a hundred and seventy-four for his rival. The situation caused some dismay in wealthy Conservative circles, where it was hoped that when (as the constitution required) the two houses of congress met in joint session to pass upon the election, they would find some device for eliminating from the presidency the avowed friend of labor. Such a possibility roused Alessandri's supporters, who charged that the other side aimed to rob him of the election. The Conservative leaders soon realized that if the popular candidate were defeated by questionable means the country would probably be plunged into a devastating civil war; hence the leaders of the two sides agreed to appoint a special commission, known as a "tribunal of honor," to pass upon the validity of the election. This body, by a majority of one vote, gave the victory to the Liberal Alliance candidate.

Arturo Alessandri, the first man of "the people" to become president of Chile, took office in December, 1920. His troubles began at once. Not only was there the usual difficulty in securing a working cabinet, but the majority in the senate was made up of nitrate aristocrats and others strongly hostile to the executive, whose program was frankly unfavorable to their interests. Even in the chamber of deputies, where the Liberal Alliance was dominant, a factional split weakened the support given the executive.

Time passed; and Alessandri remained powerless to secure the passage of promised legislation for reform, thereby causing labor to become clamorous and his friends in general to show a tendency to desert him. Resentment toward the executive was increased by the fact that whereas labor and the army and navy were poorly paid, the house of deputies, where the president's party was in control, voted its members a large increase in salaries. By the latter part of 1921 the situation seemed so hopeless that Alessandri resigned, but he was induced by one of his ministers to reconsider and remain in office. The situation did not improve, however; and early in September, 1924, came a joint ultimatum from the army and navy demanding that certain reform measures be enacted immediately. Since the president was unable to get anything done with his refractory machinery of government, he resigned on the eighth of the month. Congress refused to accept his resignation, but granted him a six months' leave of absence, and he departed for Argentina in a special train flying the United States flag.

As soon as Alessandri was out of the way a military junta seized control of the government, dissolved congress, appointed a new ministry, and proceeded to pass, in the form of decrees, laws which for years the country had needed and desired. Many of these were in the interest of labor and of bettering social conditions in general.

The head of the junta, however, was much disliked, which led on January 23, 1925, to an overthrow of the government, with aid from army and navy officers. The new junta which established itself in control invited Alessandri, then in Venice, to return and resume office. The request was backed by leaders of all political groups, and Alessandri, confident of support, returned, arriving in Santiago on March 20, 1925, amid great popular enthusiasm. But he was unwilling to risk another experience with congress under the existing constitution and therefore proceeded to legislate, as had the deposed junta, by passing decrees. Since there was demand for restoration of constitutional rule, a committee was given the task of drafting a revised plan of government, which was approved by a national plebiscite in August, 1925. Two months later the constitution went into effect.

THE RETURN TO STRONG EXECUTIVE AUTHORITY

This new basic law was a frank recognition that parliamentary government had been a failure in Chile, and provided for a return to the principle of a strong independent executive. Under the new arrangement the president was to be elected for six years by direct vote and was ineligible for immediate reelection. The cabinet members and intendants of provinces were to be appointed by him independently of congress and were to be responsible to him only. To prevent the legislative branch from dominating the executive through financial means, the constitution provided that if the budget was presented to congress at least four months before the period for which it was to apply it should go into effect whether or not that body had passed upon it. Under the new arrangement a move was made toward governmental decentralization through provision for provincial assemblies to be presided over by the intendant, who was to have the right of veto, but measures passed by a two-thirds vote should go into effect without executive approval. Suffrage was granted to all literate men above twenty-one years of age. The Roman Church was no longer recognized as the state religion, but it was to receive an annuity of two million, five hundred thousand pesos from the government for five years. Liberty of conscience was definitely granted, and freedom of worship to "all cults not opposed to morals, good customs, or public order."

President Alessandri resigned as soon as the constitution was adopted, and his place was filled by the vice president until the general election under the new fundamental law. This took place late in October, 1925, and resulted in a victory for the Conservative candidate, Emiliano Figueroa. Figueroa, however, found his position very difficult, partly because of the ambition of Carlos Ibáñez, a military officer who had been in governmental positions for some years and under the new administration was minister of the interior. Early in 1927 Figueroa was forced to resign his office. Ibáñez was made vice president by the council of ministers and was later chosen president of the country at a special election.

The accession to power of Carlos Ibáñez brought back to Chile the iron-hand methods employed by Diego Portales nearly a century before. Opposition was punished by proscription or imprisonment, graft and extravagance were eliminated from the government, and extensive reform programs were undertaken. In the interest of more efficient administration as well as of economy the twenty-three provinces forming the republic were reduced to sixteen and the departments making up the provinces were cut down in proportion. For the purpose of fostering agriculture new irrigation dams were built and several hundred miles of vehicular roads were constructed to connect farms with railroad stations. The nitrate industry, which for some years had been in a depressed condition, was revived, and the output increased, through the stabilization of prices by organization of the producers, on the recommendation of the government, into a sales corporation. The mining of coal, which had felt the competition of foreign petroleum, was likewise stimulated by the improvement of port facilities for loading and unloading it, resulting in its greater use in the nitrate regions of the north. A sanitary code, drawn up with the aid of an American expert before Ibáñez came into office, was put into effect, and Chile's unusually high death rate began to show marked decline.

But the most sweeping and comprehensive reform movement undertaken by the new administration was that intended to make a literate nation of Chile's almost four million inhabitants. Large numbers of teachers were sent to the United States and other countries to study and bring back new educational ideas, and teacher-training schools were reorganized. In 1928 nearly one hundred million pesos was assigned to the support of primary education, which represented the largest effort ever made by the Chilean government in this regard. The Foundation Company of the United States was given a contract to work on and complete in five years' time about six hundred school buildings, some of them old structures to be repaired but most of them new rural schoolhouses, to supply facilities toward wiping out the country's 40 per cent of illiteracy.

XXVII

PARAGUAY

ONE of the most influential factors in Paraguay's history has been its remote, landlocked position in the heart of the South American continent. During its first generation of colonial existence it was given a strong bent toward an isolationist psychology by the fact that it was the only European political unit in the vast stretches of the Plata basin and, because of its remoteness, was practically independent. The Jesuit reductions which in the seventeenth century developed to the south of the lay settlements of the province tended to accentuate the hermit character of Paraguay because of the policy of aloofness toward things European pursued by the missionaries. Futhermore, both sections of the province, lay and ecclesiastical, early learned to fight their own battles, especially against the Paulistas of Brazil; for no help was to be counted upon from the mother country.

It is, then, not to be wondered at that Paraguay in the very beginning of the movement for independence adopted a policy of avoiding political entanglement with Buenos Aires. The man who was most bluntly insistent upon this course, and who at the outset favored freedom from Spain as well, became the first leader of independent Paraguay. This was José Gaspar Rodríguez Francia, a native of the province who had studied law and theology in the University of Córdova in La Plata and was a prominent magistrate of Asunción when the independence movement began.

It was Francia who wrote the "By-laws of Government" adopted for the "Republic of Paraguay" in October, 1813; and he framed them, taking a leaf from Napoleon Bonaparte's notebook, with a view to controlling the country himself. As Fulgencio Yegros, a gaucho member of the revolutionary junta, was too strong to be safely ignored in matters of government, in his by-laws Francia provided that the executive power should be wielded by two consuls, each of whom should have control of half the military forces of the country and should by turn, for periods of four months, be its president. He so arranged, however, that he was in executive control when congress met in October, 1814, and induced it to abolish the consulate and make him dictator for five years. A congress which was called two years later gave him the position for life, and during the next twenty-four years Francia was the supreme authority in Paraguay.

The dictator Francia was of the type more likely to inspire respect and fear than love and blind loyalty: he was taciturn, suspicious, self-sufficient, shrewd, farsighted, and financially honest. His policy was apparently shaped with the object of keeping the country independent in the face of danger from Spain, Buenos Aires, and Brazil, and of avoiding such revolutionary disorders as distracted the neighboring states. The authorities at Buenos Aires, hoping to force Paraguay into a political confederation, laid heavy toll upon all commodities from that country seeking foreign markets by way of the Plata, Paraguay's only commercial outlet. In the face of this situation Francia adopted an isolationist policy and made the country a hermit nation.

He strongly fortified the frontiers of the country, making it difficult for anyone to enter or leave, and forced the inhabitants to be economically self-sufficient. After the expulsion of the Jesuits, agriculture had declined in Paraguay, and the chief crops raised when Francia came into control were tobacco, cane, manioc, and mate. Various foods and most of the cotton used in the country were imported from the south. Under Francia's management the inhabitants varied their crops and increased their acreage, soon producing all the necessary cotton as well as adequate food. Live stock greatly multiplied also. Manufacturing was fostered, especially the weaving of cotton. By means of fairs held at various points, the products of the country were exchanged, largely by means of barter, for money almost disappeared from circulation. The rivers were barred to all except a few definitely licensed vessels. Little was bought from the outside world except munitions, and these were secured from Argentina in return for tropical woods which she much desired.

The population at the time of independence may have numbered as many as two hundred thousand, made up largely of aborigines, chiefly Guaranís, with a small fraction of mestizos and whites. The dictator did practically nothing for the education of the nation, but used the Church as one means of keeping it under control; and to guard against divided loyalty and too much power in the Church he refused to recognize papal authority, made his own clerical appointments, abolished the religious orders, reduced the number of saints' days, and prohibited religious processions. But Francia's chief dependence for maintaining control, on the whole, was force, secured through the army, which he usually trained himself. To the Guaranís, who had learned docility from the Jesuits, the dictator was "El Supremo," a mysterious individual who inspired awe and half worship, and they were little inclined to question his authority; but among the upper classes, especially the whites, opposition was found, and upon all who even roused his suspicion the dictator laid cruel hands. In his last years his tyranny increased, and so great was his fear of plots that he forbade all public gatherings, even for amusements, and punished his supposed enemies with greater harshness than before. Nevertheless during his long rule the country enjoyed peace and the population was welded into an intensely self-conscious, loyal, and united nation.

In September, 1840, José Francia died at the age of seventy-four, without having made any provision for a successor. A military group assumed control; but a congress which was assembled early the next year elected two consuls, as had been done twenty-seven years before. The more energetic and able of the two was a mestizo lawyer, Carlos Antonio López, who repeated with slight variations the tactics used by his predecessor. Desiring a rule that was at least nominally constitutional, López had the congress which met in 1844 draw up a basic law providing for a president with practically dictatorial powers, to be elected for a ten-year term; and he had himself elected to the office. In 1854 he was reëlected and remained dominant over Paraguay until his death; for though congress, in accordance with the constitution, met every five years, its chief function was to approve the policies pursued by the president since the last session.

Carlos Antonio López was the best of the three dictators who ruled Paraguay during the first sixty years of its national life, and did considerable for its advancement. He distributed public lands among those who lacked soil for agricultural purposes, and he encouraged immigration, and in 1855 settled a colony of French from Bordeaux at Nueva Burdeos ("New Bordeaux") in the Chaco across the river from Asunción. The government monopolies of timber, hides, and maté which he established worked hardships in some sections; but in general he did much to develop commerce. Cart roads were built in various parts of the country; the telegraph was introduced; the rivers and ports of the republic were opened almost without restriction to the vessels of foreigners and of Paraguayans, and in 1861 was completed the first railway, which connected Asunción with Paraguayí.

Although he kept the Church under restraint, he gave it a more dignified position than it had enjoyed under Francia by permitting the consecration of a bishop for the country and building a cathedral and a number of other churches.

The new dictator encouraged education. The Colegio Carolina, which Francia had closed, was reopened under the direction of an educator from Europe, with courses in lay instruction as well as in theology, and every village and town was supplied with at least one primary school. Though few of the women of the country were literate at the end of Carlos López's era, apparently most of the men were, except the wild Indians. It is said to have been customary to offer proof of Paraguayan nationality among the more ignorant neighboring nations by the proud statement, "I am a *Paraguayo*; I can read."

Early in López's rule the first periodical of the country was established. This was *El Paraguayo Independiente*, which was chiefly interested in defending national boundary claims, but later other papers more generally informational came into existence.

Carlos Antonio López's foreign policy was as energetic as his domestic one. On November 5, 1842, while the consular system was still in effect, under his influence a declaration was drawn up stating that Paraguay was "forever, by fact and by law, a nation free and independent of all foreign powers." This document was signed by López as president of the "sovereign general congress" and by the four hundred deputies forming the gathering; and copies of it were sent to neighboring governments as warning not to regard the death of the stern Francia as offering an opportunity for the conquest of Paraguay. Soon afterwards various nations recognized Paraguayan independence. One of the first was the Brazilian empire, which acted in 1844 and influenced other nations to do so.

Rosas, the tyrant of Argentina, persisted, however, in looking upon Paraguay as a refractory member of the Argentine Confederation and repeatedly made hostile attempts against it. Some of López's political enemies who were exiles in Buenos Aires added to the difficulty of the situation by encouraging Rosas in his efforts to conquer and annex the territory. But the long-standing Argentine menace was eliminated in 1852 by the overthrow of Rosas and the recognition of Paraguayan independence by his successor.

However, there were still unsettled boundary disputes to give trouble, especially with Brazil and Argentina. The former claimed territory between the Blanco and Apa rivers, and proceeded to occupy it. The López government made in 1850 a vigorous protest which caused the Brazilian forces to be withdrawn, but left the question of limits unsettled. An agreement made in 1856 between the two countries to defer the settlement for six years ultimately proved unfortunate for Paraguay. A similar agreement was signed in the same year with Argentina, with which Paraguay had a dispute involving much of its southern frontier.

López also had trouble with France over the alleged ill-treatment of the colonists at New Bordeaux; with England owing to the fact that a man claiming to be a British subject was sentenced to death for participation in a plot against the dictator's life; and with the United States in consequence of a Paraguayan attack upon the American war vessel *Water Witch*, which, under existing treaty rights, was making a scientific survey of the upper Paraná River. The attack on the vessel was apparently caused by the fact that the leader of the expedition, Lieutenant Thomas Page, had sided with Edward Hopkins, the American consul at Asunción, who had quarreled with López over money which the dictator had lent him, and had been dismissed. In all three cases of friction López was worsted, on the whole. For the attack on the *Water Witch* he was forced to apologize and to indemnify the family of the helmsman, who was killed by a Paraguayan shot; but the mixed commission to which the Hopkins dispute was referred decided in favor of López.

Partly because of the long menace from Argentina and the unsettled boundary disputes, military preparedness was an important part of Carlos López's policy. One war vessel was built in England and others in shipyards set up in Paraguay. Cannon and balls were supplied by a foundry set up by technicians brought from England, the metal used coming from a newly opened iron mine. Various fortifications were erected, the most notable being those at Humaitá on the Paraguay River. In 1855 López placed his son Francisco at the head of the large army which he had built up, and also made him minister of war.

According to George Frederick Masterman, who spent some years in Paraguay, Carlos López was deeply attached to his country and had a very exalted idea of governmental power, which to him was a "vague but terrible abstraction." As its representative he received even visitors of the highest rank without rising from his seat, and with his hat on. Yet this did not prevent him from grossly violating a clause in the declaration of independence stating that Paraguay "should never be the patrimony of one person or one family." He provided well for his children at public expense, giving high office to other sons besides Francisco; and they rapidly became wealthy, partly (according to one historian) through intimidating people into selling them cattle at very low rates. Francisco was definitely put in a position to become his father's successor by giving him control of the army and naming him to serve as vice president after his father's death until an election could be held.

The elder López died on September 10, 1862; and on the twelfth of the next month an extraordinary congress elected Francisco president for ten years, under stimulus of the facts that Francisco was present during the session and that the army, of which he was commander in chief, surrounded the congressional building while the election took place.

Francisco Solano López was less able than his father. He was vain, unstable, silly, cruel, and as unprincipled as Napoleon Bonaparte. For about a year before his appointment as commander in chief of the army he was diplomatic representative for Paraguay in England and France. He already counted on being his father's successor, and in Paris he was fired with the ambition to emulate Napoleon I. In this he was doubtless encouraged by Madame Elisa Lynch, a clever, unscrupulous woman of Irish descent who accompanied him back to Paraguay as his mistress. Later he had portraits of himself painted in Napoleonic poses and ordered a model of Napoleon's imperial crown to be made in Paris; but the inconsiderate Argentine authorities embargoed the model in Buenos Aires on the way to Asunción, and it never reached the ambitious dictator.[1]

There appears to be no doubt that as minister of war Francisco López built up a fighting machine partly with imperialistic intent; for he wanted more territory and appears to have hoped to incorporate the Argentine provinces of Entre Rios and Corrientes, and possibly Uruguay, into a greater Paraguay, thus making an empire of dignified size. On the other hand, both Francisco and his father were suspicious of the designs of Brazil and of Argentina, even after Rosas was overthrown; and the unsettled boundary questions served to maintain the distrust.

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[1] The model is now in one of the historical museums of Buenos Aires.

The governments of Brazil and Argentina, for their parts, were roused against Francisco López by his extensive military preparations. That his Napoleonic strut was observed by the latter seems evident from the seizure of the model of the crown which he had had made in Paris.

Military preparedness is especially inimical to peace when combined with nationalistic ambition, and soon a situation developed which precipitated a conflict. This arose over Uruguay, where the dominant *Blanco* faction was having trouble with Brazil because of alleged ill-treatment of Brazilian subjects resident in Uruguay. Failing to get satisfaction, Brazil intervened on the side of the Uruguayan "outs," the *Colorados*, who had been receiving secret aid from Argentina. Ostensibly as a result of appeals for support from the Blanco government, Francisco López asked Argentina and Brazil for explanations of their attitudes toward the government in Montevideo, but received none. A little later (August, 1864), he protested against an ultimatum sent by Brazil to the Uruguayan government, declaring that occupation of Uruguay by imperial troops would jeopardize the balance of power of the Plata countries.

Brazil ignored the protest and invaded Uruguay, whereupon López, on November 12, 1864, broke off diplomatic relations with Brazil, closed the rivers of the country to the vessels of Brazil, and seized a Brazilian packet at the time on the Paraguay bound for the north. This was the first act of war, and yet war had not been declared. López promptly followed up these measures by having his troops overrun the Brazilian state of Matto Grosso. Desiring to strike at Brazil in the south, in January, 1865, López asked permission of President Mitre of Argentina to pass troops across Corrientes. Mitre refused; and on March 18 an extraordinary congress called by López declared war on Argentina.

A month before this Venancio Flores, the leader of the Uruguayan Colorados, had secured control at Montevideo, and on May 1, 1865, the governments of Brazil, Argentina, and Uruguay formed a secret defensive and offensive alliance against López with the specific aim of overthrowing him. The war, declared the agreement, was not to be directed against the people of Paraguay but against their dictator, and the independence and territorial integrity of the country were specifically guaranteed; but Paraguay must bear the cost of the war and also pay indemnities. A clause describing acceptable boundary limits for the enemy country made it apparent that the triple alliance also aimed to trim away much of that country's territory. The treaty did not long remain secret. A copy was secured and published, which resulted in energetic protests from various other South American countries against the aims of the triple alliance.

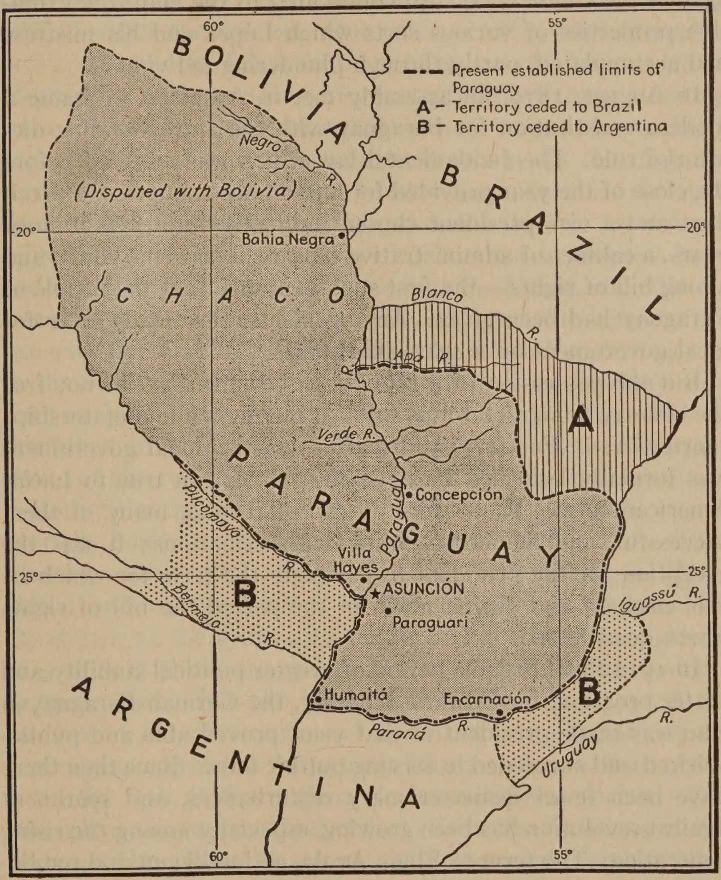
By this time the war was fully under way. López had been made marshal of the army, which probably contained as many as fifty thousand men and was said to be the best in South America. Yet the outcome of the contest was clear at the start to all except the crazily vain dictator and the misled Paraguayans, who were many times outnumbered and were shut off from all outside aid, but they fought with frenzied zeal under the battle cry "Conquest or death!" The slogan proved grimly appropriate, for López soon began to look upon defeat as a crime, and punished by torture or execution not only vanquished military officers but the women of their families as well. The dictator even had several of his own relatives put to death on charges that were probably quite false.

By the time the allies had penetrated well into the doomed country, practically all the able-bodied men had been killed off, and the retreating Paraguayan forces were largely composed of half-grown boys, with whom also fought thousands of women. Famine and disease were contributing to the rapid reduction of the population; for though the women had early been conscripted to do the farming and other civilian work, the general demoralization soon became so great that their organization broke down and the food supply gave out. In March, 1870, the war ended with the defeat in northern Paraguay of the last remnants of Lopez's army and the death of the dictator himself. By this time the population of the country had probably been reduced by 50 per cent; in the following months starvation and pestilence continued to take their toll of thousands. Rarely in the history of nations have a people come so near complete extermination by war, and yet survived, as did the Paraguayans in their struggle against the triple alliance.

In 1869, after Asunción had fallen into allied control, a provisional government had been set up under the auspices of Brazilian military officers, and in it special favor was shown to Paraguayans who had fought with the invading armies against López. In June, 1870, the allies signed with this government a treaty of peace in which it was stipulated that Paraguay should pay an exceedingly heavy indemnity; but, partly because the country was too wrecked to be left to itself, some military forces of the enemy remained upon Paraguayan soil until 1876. During this time, under the influence of Comte d'Eu of Brazil, the slaves of Paraguay were freed.

Owing to jealousy between Brazil and Argentina, Paraguay fared less ill in regard to territorial cessions than at first had seemed likely. Soon after the treaty of peace was signed Brazil agreed to support Paraguay in its stand for some sort of basic justice in its territorial settlement with Argentina. Consequently Paraguay ceded to Brazil the disputed tract of land lying between the Apa and Blanco rivers. Four years later a treaty was made between Paraguay and Argentina by which the latter received the Misiones district to the southeast of the Paraná and the territory between the Bermejo and Pilcomayo rivers; but, partly because of the moral support given to Paraguay by Brazil, Argentine claims to the north of the Rio Verde —a right branch of the Paraguay—were abandoned, and it was agreed that the title to territory between the Rio Verde and the Pilcomayo should be determined by the president of the United States. In November, 1878, President Rutherford B. Hayes rendered an award in favor of Paraguay, in gratitude for which the Paraguayan government gave the name "Villa Hayes" to the little town once known as New Bordeaux, which lay in the disputed area.

While the prostrate midland state was making adjustments with its conquerors it was also reconstructing national life on a new basis. Before López met his death most of the nation had turned against him, and one of the first acts of the provisional government after its formation in 1869 was to express


60°
55°
--- Present established limits of Paraguay
A – Territory ceded to Brazil
B – Territory ceded to Argentina
BOLIVIA
BRAZIL
Negro R.
(Disputed with Bolivia)
20°
Bahia Negra
CHACO
Blanco R.
Apa R.
A
Verde R.
PARAGUAY
Concepción
Paraguay
Pilcomayo R.
Villa Hayes
25°
B
ASUNCIÓN
Paraguarí
Bermejo R.
Iguassú R.
ARGENTINA
Humaitá
Encarnación
B
Paraná R.
R.
Uruguay
60°
55°

TERRITORY INVOLVED IN BOUNDARY DISPUTES OF PARAGUAY

the extreme bitterness of his opponents by a decree declaring the dictator an outlaw "forever cast forth from Paraguayan soil as an assassin of his country and an enemy of humankind." In May, 1870, after López had been killed, the government adopted a measure denouncing Madame Lynch, who was then in prison, for her evil influence upon Paraguayan affairs and as an accomplice in the great crime of war which had been committed against the country. It also confiscated to the state the extensive properties of various sorts which López and his mistress had accumulated, partly through plundering individuals.

In August, 1870, an assembly met in Asunción to frame a modern constitution for Paraguay with the aim of ending dictatorial rule. The fundamental law which was adopted before the close of the year provided for a two-house congress, a president and a vice president chosen indirectly for terms of four years, a cabinet of administrative officers, a supreme court, and a long bill of rights—the first such guaranty that the people of Paraguay had been given. Arrangements were made later for local government on a centralized basis.

But the possession of a republican constitution did not free the country from dictatorial rule: it merely made dictatorships shorter-lived. For forty years after constitutional government was formally launched Paraguayan politics ran true to Latin-American form. There were dozens of revolts, many of them successful, and numerous political assassinations; it was the exception for the president to complete the term for which he was elected; and during much of the period the bill of rights was a dead letter.

In 1912 there began a period of greater political stability and better progress, for Edward Schaerer, the German-Paraguayan who was made president in that year, proved able and public-spirited and succeeded in serving out his term. Since then there have been fewer insurrectionary disturbances, and sentiment against revolution has been growing, especially among the rising generation. The term of Eligio Ayala, an intelligent and public-spirited lawyer who served as constitutional president from 1924 to 1928, was the most progressive and prosperous that the country has known.

Since the settlements following the war with the triple alliance, Paraguay's most serious foreign question has been a boundary dispute with Bolivia over the northern Chaco, an extensive area.

In 1879, while Paraguay was still prostrate from the terrible war, a treaty was signed with Bolivia giving the latter all territory to the north of a line running due west from the mouth of the Apa to the Pilcomayo; but this agreement failed to be ratified within the time set. One made in 1887, more favorable to Paraguay, also failed to be ratified, as did later treaties. Meanwhile, as the two countries recovered from the prostrating wars from which they had suffered, each took an increasingly aggressive stand with reference to its claims in the disputed territory. Relations therefore became more strained. In 1927 the prospect of settlement brightened, for the two nations accepted an invitation from Argentina to meet in Buenos Aires and negotiate under Argentine mediation. Almost immediately after the sessions began, however, a dispute arose between the two over the meaning of the protocol by which they had agreed to the meeting; but discussion continued in a desultory way until early in December, 1928, when a clash, which Bolivia attributed to Paraguayan action, took place between the garrisons of the two countries stationed in the disputed territory.

Both sides began rapid preparations for war, which was averted, however, through the prompt action of the Pan-American arbitration conference at the time sitting in Washington and of the Council of the League of Nations. On December 14 the arbitration conference tendered its good offices to both countries, and two days later the Council of the League acted. The two governments promptly accepted the services of the conference and agreed to cease mobilizing. A commission appointed through the efforts of the conference was given the task of determining the responsibility for the clash which had almost precipitated war. Later the functions of this body were broadened by mutual agreement, and it undertook to try also to find a solution for the boundary question. On September 12, 1929, the commission, headed by General Frank R. McCoy of the United States, reported that in the recent difficulties hostilities had been begun by the troops of Paraguay, but it stated that conciliation had taken place and refrained from a specific fixing of responsibility. The report recommended that the two countries restore conditions on their frontiers to the state existing before the clash took place. No agreement was reached as to a boundary line in the disputed territory.

Since 1870 Paraguay has made progress along all lines, but at first the advancement was slow and fluctuating. For many years the financial situation was very unsatisfactory. This was not because of the indemnity demanded by the treaty that ended the war with the triple alliance; for in 1883 Uruguay waived all claims to payment and also returned to Paraguay the flags and trophies captured during the war, and Paraguay ignored the debts owed to Argentina and Brazil, pointing out that, according to their own assertions, the allies made war not upon the Paraguayan nation but upon the tyrant López. The two allies have not pressed for payment. There have been other financial burdens, largely originating in loans contracted abroad, especially in England. For long periods the Paraguayan government was unable to pay interest on the foreign debt. No very marked improvement took place until the accession of President Eligio Ayala in 1924; but during his administration honesty, economy, and general efficiency reigned. A new tariff system planned by an American expert was adopted; the rate of exchange was stabilized by fixing the value of the much-depreciated paper currency in relation to the Argentine gold peso, which circulated freely in the country; general economic development was fostered; and the interest on the old London loan, which had been in arrears for many years, began to be paid regularly.

The Paraguayan government has tried to encourage agricultural development through two means, in particular: farm colonies and a land bank. Immigrants from Germany and Italy began to settle on the land before the close of the nineteenth century and formed some rather prosperous communities. A much more comprehensive project involved the colonization of Mennonites from Canada and the United States; in 1926 they began to arrive in Paraguay, after being promised absolute freedom from military service and three million acres of land for settlement in the northern Chaco. By 1929 a few thousand of them were pioneering in the Chaco wilderness under protection of government troops.

The land bank, or Banco Agrícola, founded in 1887, has had for its chief business the stimulation of agriculture and industry through loans of money, educational work of a practical sort, and the like. Its services have involved introducing new seeds and plants and breeds of stock, aiding the farmers to market their crops, and showing them modern methods. One of the bank's most recent achievements has been interesting farmers in modern types of machinery, with the result that many thousands of primitive wooden plows have been supplanted by steel ones and even by motor tractors.

Cattle-raising, always an important industry in Paraguay, greatly expanded after 1870. The 15,000 head of cattle, said to have been all that were left in the country when the war with the triple alliance ended, had by 1920 grown to 2,500,000; and the breed had been improved by introduction of Hereford and Durham types from Europe.

Among the tillage crops are sugar cane, cotton, rice, and tobacco. Oranges, planted by the Jesuits and later permitted to run wild, have long been the most important Paraguayan fruit; formerly they were gathered in large quantities for exportation to Uruguay and Argentina, but during the last two or three decades these markets have dwindled owing to the rapid expansion of citrus-fruit growing in those countries. Until recent years mate, an important product of the country, was chiefly gathered wild in the forests, but now it is being planted.

The leading forest product is the quebracho tree, found largely in the Chaco. It is used to some extent for cabinet-making and for railroad ties, but more for the sake of the tannin it contains. The quebracho industry, which is only about twenty years old, has grown rapidly. At first the logs were sent to factories in other countries for the extraction of the tannin, but extracting plants quickly developed in Paraguay, and there are now several, the largest, at Puerto Pinasco on the Paraguay River, having in 1926 several thousand employees.

With the exception of the tannin, practically all the manufactures—chiefly sugar, cotton cloth, and soap—are consumed locally.

Between 1912 and 1927 the exports of the country, largely made up of mate, tobacco, cattle, hides, and quebracho extract, tripled. In 1927 the total was valued at nearly $14,000,000, and more than a fourth of this amount came from quebracho.

The fact that Paraguay is traversed by long navigable rivers, by which more than two thousand steamers reach Asunción yearly, has tended to delay the development of artificial roadways. It was not until 1911 that the capital of the country was connected by rail with Encarnación on the southern boundary. Two years later, however, through train service was established between Asunción and Buenos Aires by means of a steam ferry across the upper Paraná and a change of gauge in the Paraguayan line to equal that of the Argentine Northwestern Railroad. The trip between the two capitals was now accomplished in fifty hours, two days less than had formerly been possible by boat, and did much toward bringing Paraguay out of its isolation. Vehicular roads in the country as a whole, used largely by oxcarts, are poor; but after 1925 the introduction of motor vehicles on a rather large scale resulted in the improvement of roads between some of the larger towns.

The population of Paraguay is estimated at present as being almost 1,000,000, with about 104,000 in Asunción, the largest city, which in 1905 had only a little over 60,000 inhabitants. In the Chaco to the west of the Paraguay River there are perhaps 50,000 uncivilized Indians of various tribes, over whom since 1889 a slowly transforming influence has been wrought by W. Barbrooke Grubb, a missionary of the Church of England, and his successors. Most of the remainder of the population is of almost pure Guaraní blood, for the white element, chiefly Spanish in origin, is slight. The country is bilingual, both Guaraní and Castilian being used by a large portion of the inhabitants.

Though the condition of labor is poor, no debt slavery exists, and unions have been formed for bettering the lot of those who toil. Since the war with the triple alliance, much of the heavy work of the country has been done by the women, for the fact that they far outnumbered the men caused the latter to become indolent.

Though in 1872 a department of public instruction was established in Paraguay, national poverty and general demoralization for many years prevented educational progress. The few schools, which were elementary in character, merely languished. In 1877, however, a secondary school was founded in the capital, and in 1889 the University of Asunción was opened with a number of professional departments. Subsequently normal schools were established. Not until about 1912 was any comprehensive effort made to reduce the very high percentage of illiteracy by increasing the facilities for primary training; but from that time on good progress was made, and in 1923 it was estimated that half the children of school age were enrolled in classes.

XXVIII

URUGUAY

¿ Qué representan esas divisas *blancas* y esas divisas *coloradas*?

Representan las desgracias del país, las ruinas que nos cercan, la miseria y el luto de las familias, la vergüenza de haber andado pordioseando en dos hemisferios, la necesidad de las intervenciones extranjeras, el descrédito del país, la bancarrota con todas sus amargas humillaciones, odios, pasiones, miserias personales.

Written by Andrés Lamas in 1855

THE independence of Uruguay, known officially as La Republica Oriental del Uruguay, was belated chiefly because the land was long a bone of contention between Spain and Portugal. After Portuguese troops took advantage of the preoccupation of the Buenos Aires leaders with other matters and seized control of the Banda Oriental, the province remained fairly quiet for some years, first under Portugal and then under the Brazilian empire. A considerable fraction of Orientals, however, were opposed to domination by the great state to the north. Some of these disaffected individuals were exiles in Buenos Aires when, in December, 1824, the battle of Ayacucho, Peru, doomed the power of Spain to total elimination from South America.

This decisive conflict roused the expatriates from across the Plata to action in the interest of freeing their land from the rule of Brazil. For their leader they chose Juan Antonio Lavalleja, a soldier of Artigas who had at first favored union with Brazil but had undergone a violent change of view. This group, known in Uruguayan history as the "Thirty-three Immortals," landed on Uruguayan soil on the night of April 19, 1825, and Lavalleja unfurled to the breeze a tricolor flag bearing the motto "Liberty or death!" Bloody conflict soon followed. A considerable number of the inhabitants of the Cisplatine province rallied round the flag of independence, and in August of the same year the revolutionaries were able to hold in the village of Florida a general assembly which, on the twenty-fifth of the month, declared the province independent of Brazil and incorporated with the United Provinces of the River Plata. In view of the experience of Artigas, a lone struggle with Brazil seemed almost certain to prove futile, and since the Orientals were of the same language and traditions as their neighbors across the river, domination from Buenos Aires seemed preferable to rule from Rio de Janeiro.

The congress in session in Buenos Aires responded favorably to the gesture made by the rather desperate Orientals by voting to give them aid in their efforts to free themselves from Brazil. This led Brazil to declare war against Argentina on December 10, 1825. In the struggle that followed the advantage went on the whole to the revolutionaries and their allies; but the British government was disinclined to see the Brazilian empire actually worsted by the Plata provinces, and, furthermore, it was anxious to have an independent buffer state established between Brazil and Argentina. Hence Lord Ponsonby, the British agent at the peace conference which met in August, 1828, stood out for the freedom of the province. The delegate from Buenos Aires protested that the Banda Oriental was only large enough to make a handsome country estate, but British influence prevailed. A treaty was signed whereby the former Cisplatine province was recognized as independent, but with the stipulation that the constitution of the new Eastern Republic of the Uruguay must be approved by both Brazil and Argentina.

Accordingly, a provisional government was set up for the little state and a centralist constitution was framed providing for a two-house congress, which was authorized to elect a president for a four-year term. Brazil and Argentina definitely approved the document, and it was formally adopted by the Uruguayan authorities on July 18, 1830.

Thus, after spending most of the preceding twenty years in armed conflict, the people of Uruguay seemed at last free to work for their progress as an independent nation. However, there were two especially strong factors which defeated this possibility. One of these was the long period of warring. The population had developed such a strong militaristic psychology that they were less able than the other Spanish-American states to settle down to a régime of law and order. In fact, the basis was laid for factional strife even before the constitution was adopted; for a quarrel took place between Lavalleja, the leader of the Thirty-three, and Fructuoso Rivera, who had been his ablest general in the war against Brazil. In the presidential election of 1830 these two were candidates, and Rivera won, an outcome to which Lavalleja would not reconcile himself, and two years later he revolted against Rivera's government.

After a considerable period of fighting and political turbulence, the two factions agreed, in March, 1835, upon Manuel Oribe, one of the Thirty-three, as president. But the new executive quickly roused the enmity of Rivera by rather ignoring him and by permitting the Lavallejista exiles to return to the country; hence in 1836 Rivera revolted against Oribe, and thus was fully launched the bitter political factionalism that rent Uruguay for nearly a century. The partisan groups were known as *Blancos*, for the white flags of Oribe's soldiers, and *Colorados*, for the red ones of Rivera's followers; and these names were continued, with somewhat varying significance, practically down to the present time.

The other retarding influence on Uruguayan history was the meddling of the dictator Rosas of Argentina, who came into power just after the Oriental Republic was launched. Rosas persisted in regarding the latter, as he did Paraguay, as a perverse member of the Argentine confederation which must be brought to submission. But Uruguay, because of its proximity to Buenos Aires and its political disorderliness, was the more promising object of coercive effort, and to it he gave special attention. When Rivera raised the standard of rebellion in 1836, Rosas allied himself with Oribe and the Blancos, and to the Blancos he gave support—and asylum when they were "outs"—during the rest of his career. On the other hand, various northern Argentine provinces which opposed Rosas gave to the Colorados such aid and comfort as they could, as did foreign nations having quarrels with the dictator.

Fortunately for Rivera, Rosas's high-handed treatment of some French subjects led France early in the factional strife to blockade the port of Buenos Aires. The blockading officers gladly disciplined the Argentine tyrant further by helping the Colorados, thereby enabling them to defeat Oribe, who resigned office in October, 1838. On the first of the following March Rivera was elected president of Uruguay, and on the tenth of the month he declared war against Rosas, "the tyrant of the immortal people of South America." Allied with Rivera was the Argentine province of Corrientes, and he also had the aid of a thousand French troops. With this help he was able to defeat Rosas's armies in December, 1839, and to drive them out of Uruguay.

The next year the French authorities reached an understanding with the Argentine dictator and withdrew from the Plata region, leaving Rivera and his Colorado supporters rather at the mercy of their pugnacious neighbor across the river. Rosas now resumed the offensive. Rivera had aid from the Argentine provinces of Corrientes, Santa Fé, and Entre Ríos, and from Giuseppe Garibaldi, the soldier of fortune who later rendered valiant service to his native Italy; the Argentine dictator was strongly supported by the Uruguayan "outs," and Oribe himself was commander in chief of the allied Blanco and Argentine armies. The invaders made serious headway. In February, 1843, began what is known in Uruguayan history as the Great War, which was characterized by an eight years' siege of Montevideo.

Two years later England and France blockaded the Plata because they resented Rosas's designs upon Uruguay and his treatment of their nationals. The occupation of the river's mouth continued until 1849, and was accompanied by efforts of the two blockading nations to terminate by negotiation the intolerable situation of the embattled little state; but the French national assembly failed to ratify the treaty, and nothing definite was accomplished.

In 1851, however, an effective alliance was formed against Rosas by Brazil, the Colorado government of Uruguay, and the Argentine provinces of Entre Ríos and Corrientes. On October 8 the allies forced Oribe to withdraw from Montevideo, and on the third of the next February they defeated the Argentine tyrant and threw him from power. Thus after twenty-two years of practically constant war the most serious menace to Uruguayan independence was removed; but the country was left a desolate wreck.

Furthermore, Rosas had not constituted the only danger, for Brazil had for some time shown much aggressiveness. In October, 1851, after the treaty of alliance against the Argentine dictator had been signed, Brazil took advantage of Uruguay's weak and helpless condition and practically forced her to sign an agreement giving up territory which she claimed between the Ibicui and Cuareim rivers and accepting the Cuareim as the northwestern boundary between the two countries. By the treaty Brazil also secured the exclusive right to navigate Lake Merim and the Yaguarón River on Uruguay's northeastern borders. The fact that Uruguay was not free to act as she pleased is apparent from another treaty signed with Brazil in the same year, whereby the latter agreed to lend Uruguay a sum of money in monthly installments in return for 6 per cent annual interest guaranteed by Uruguayan public revenues, chiefly the customs income of the country.

After the overthrow of Rosas, which ended the gross meddling of Argentina in Uruguayan affairs, political turbulence and factional strife continued in Uruguay. It had become a national habit. This invited rather undue interest from Brazil. So great was the political confusion in 1854 that Venancio Flores, the Colorado caudillo who was in power at the time, asked Brazilian aid, and in response Emperor Pedro II sent four thousand troops. But this "auxiliary army" failed to prevent uprisings against the Uruguayan authorities, and after two years it was withdrawn. In 1864, as was indicated in Chapter XXVII, trouble rose between the empire and the Uruguayan authorities over claims for damages suffered by subjects of Brazil residing in Uruguay. The Blanco president of Uruguay, Atanasio Aguirre, met Brazilian demands by counter-claims and refused the satisfaction demanded, and the imperial envoy departed with a threat to settle the dispute by force of arms.

In 1863 Venancio Flores, with the support of the government at Buenos Aires, where he had been in exile for some years, landed in Uruguay and launched a "liberating crusade" against the Blanco government. This revolutionary struggle was on when the Brazilian envoy delivered the ultimatum to President Aguirre. Soon thereafter Brazilian troops invaded Uruguay and gave aid to Flores, who had signified that if he were in power he would give more respectful attention to imperial claims. Aguirre was soon overthrown and Flores was placed in control.

At this point, it will be recalled, Francisco López of Paraguay became deeply concerned, and the war of the triple alliance against him soon followed. Aside from the increased loss of life and the added impoverishment of the country, this event made little change in Uruguay, where warfare was practically the normal order, as in Europe during feudal times. Flores, who escaped the bullets of the Paraguayans, was murdered in the streets of Montevideo in 1868; but the Colorados stayed in power in spite of repeated uprisings against them.

In 1872, after two years of unusually bitter warfare between the two factions, the Blancos were again defeated; but they showed so much strength that in a peace made in April of that year under mediation of the Argentine consul an attempt was made to bring about permanent peace by generous terms to the vanquished. By the agreement not only were the insurgents not to be punished, but the government gave the Blanco leaders five hundred thousand pesos for distribution among their men and promised to appoint from the opposition faction executive officers for four of the fifteen political units, or departments, composing the country. Though at first glance this arrangement seems preposterous, there was a degree of justice in it; for, as both sides were well aware, the Blancos, regardless of their numerical strength, had practically no chance of winning at the polls while the Colorados had control of the election machinery.

At this time the opposition—perhaps in the hope of winning better political luck—took the name "Nationals," but they continued to be generally known as Blancos, and their fortunes showed no signs of mending, though with rare persistence they at frequent intervals took up arms against the incumbent Colorados. The latter had for some time received much of their support from the merchant and professional classes of the cities, which constituted the progressive and theoretically democratic element of the population, and were able to intrench themselves by this backing, for the national current of thought was toward progress and democracy. The Blancos, on the other hand, supported by the clergy and the conservative rural population, were inevitably doomed to waning strength. This fact made many members of the opposition cling to their old allegiance with fanatical fervor and display supreme bitterness toward the dominant Colorados. To people in some of the backward country sections red color had but one meaning, and innocent foreigners who penetrated these parts wearing neckties or other articles of that hue were repeatedly in danger of rough handling as members of the enemy faction.

All was not smooth sailing for the dominant Colorados; for they always found the military activities of the opposition at least annoying, and often much worse, and they were frequently embarrassed by quarrels within their own group. This made the task of the president—who often frankly ruled as a dictator—harassing and discouraging, especially if he honestly strove to serve the nation. Such an executive was Lorenzo Latorre, who, after trying for a year to rule as a constitutional president, resigned his office in March, 1880, declaring the Uruguayan people to be ungovernable. There were plenty of others who were anxious to get their hands on the helm of the state; and the Oriental Republic of the Uruguay continued its troubled course until after the opening of the twentieth century.

Since about 1910, however, the country has enjoyed almost complete freedom from political instability and civil strife. This was partly brought about by a new law which made elections more free; but the chief causes for the change were the coming of economic prosperity, greatly increased European immigration, and the spread of education and general intelligence. The acquisition of fortunes through the development of farming and ranching made the opposition leaders less interested in militant politics, which were almost certain to fall short of their aims as well as to be economically disastrous in general. On the other hand, the Colorado leaders, who were enjoying a like material well-being, since they were in political control, had nothing to gain and much to lose by military uprisings; so that they studied hard to prevent them. The European immigrants, unused to election by revolution and intent upon bettering themselves financially, exerted a wholesome influence by frowning upon resort to arms. General education, which first made itself felt at the opening of the second decade of the twentieth century, did much toward awakening the people to the folly of political turbulence and military conflict. The great expansion of physical training and interest in sports which began about twenty years ago was doubtless beneficial too through helping to change political psychology and through teaching the Uruguayans to be good losers, whether in football or in national elections.

The final insurance of orderly elections and political peace was the adoption of a new constitution in 1918 to replace that of 1830. This basic law contained various unique or unusual features, some of which were definitely intended to mollify the opposition. Thus, there was provision for minority representation, to be protected by a system of plural voting, and for considerable local autonomy; but to guard against trouble the chief of police of each department was to be appointed by the central government and to be responsible to it. The most original feature of the constitution concerned the executive department, the powers of which were greatly curtailed by the creation of a national council of administration. This body was to consist of nine members elected on a proportional basis by popular vote for six years, one third to retire every two years.[1] The president was to be chosen by popular vote for four years, at the end of which he was to be ineligible for reëlection for eight years. To him were given the more distinctly political functions of government, including the right to propose legislation and to pass upon that enacted by the general assembly, the supervision of foreign relations, and the command of the army and navy. The council of administration, as its name indicates, was to be more concerned with distinctly administrative duties, including those relating to finance, commerce, industry, agriculture, labor, national health, and public instruction. Another sweeping change made by the new fundamental law was the disestablishment of the Roman Church, which, however, was permitted to retain all its property.

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[1] Two thirds of the seats were to be given to the majority party and one third to the political element having the next largest vote.

Though the Colorado party has dominated Uruguayan politics for sixty-five years,—since Flores overthrew Aguirre by means of Brazilian and Argentine aid,—the country has seen many developments in political thought during that time. Various minor parties have risen to struggle like the Nationalists against the government, and the incumbent faction has shown marked change in the direction of greater liberalism and even radicalism. This has been caused largely by the stimulus of the Socialists, the most dynamic of the minor groups, who during recent years have occupied numerous seats in the assembly. Consequently legislation has shown a strong bent toward bettering social conditions, through provision for an eight-hour working day, old-age pensions, employers' liability, and similar measures.

Since attaining political stability and internal peace, Uruguay has made great advancement; but even in the last forty years of domestic disorders it showed a progress not apparent in other Spanish-American countries during their caudillo stage. This was partly due to the temperate climate of the Oriental Republic, to its compact, topographically open character, and to its accessibility to Europe; but the qualities of its population had marked influence in helping the nation make the best of a bad situation. The aborigines of the Banda Oriental, mostly fierce, liberty-loving Charrúas, were never numerous, and when Uruguayan independence came they had been practically wiped out as a separate people; but before then there had been much mingling of blood between them and the Spaniards, many of whom were energetic Canary Islanders, Gallegos, and Asturians. The nucleus of the present Uruguayan nation appears, therefore, to have possessed unusual vitality, sturdiness, and capacity for endurance.

Uruguay also profited by the fact that early European immigrants preferred trying their fortunes within its borders, despite almost chronic warfare and political instability, to taking risks in Argentina under the tyrant Rosas. Hence during the first twenty years of national history a fair number of foreigners arrived, including Basques and Canary Islanders, who were among the best of the Spanish types. At an early date the government adopted the wise policy of giving the newcomers land and settling them in villages out in the rural sections. Thousands of people coming at this time, however, established themselves in the cities, especially in Montevideo. These, mainly exiles from Buenos Aires, were an important asset, for they included many men of ability who gave their talents toward the progress of the country that offered them asylum from the wrath of Rosas. After the downfall of the Argentine tyrant most of these expatriates apparently returned home.

In 1830 there were a few thousand Negro slaves in the country, and more were brought in later, but in 1842 slavery was abolished. Along the northern border were free Negroes who had crossed from Brazil, and also runaway slaves from there. The African element in the population was at no time large, however.

The total estimated population of Uruguay in 1830 was only 70,000, but by 1860 it had grown to more than 224,000, by 1900 it was almost a million, and in January, 1928, it was 1,762,451, making the Oriental Republic the most densely populated country in South America. Nearly a fourth of the total inhabitants were found in Montevideo. Most of the immigrants came from Italy and Spain, but there was a scattering from other European countries, especially Germany and Switzerland. Many of the arrivals, especially those from southern Europe, were seasonal workers who were occupied in harvesting or other rural labor the year round and alternated between the north temperate and south temperate zones. This helps to explain why in 1913, for instance, the country had 261,000 immigrants and 232,000 emigrants.

The possession of good transportation facilities has done much for Uruguayan progress. The country's greatest advantage in this connection is the fact that three fourths of its borders are washed by navigable waterways—the Uruguay, Plata, and Yaguarón rivers, Lake Merim, and the Atlantic[1]—and that it has a good harbor, Montevideo, on salt water. Between 1900 and 1915 more than twenty-eight million pesos, the equivalent of about the same amount of United States dollars, was spent by the Uruguayan government in supplying the port with capacious modern docking facilities. The fact that Uruguay has a hard, rocky surface, plus the nearness of water transportation, delayed serious demand for road-building of any sort, so that it was not until 1866 that the first concession was granted for a railroad. This was to run from Montevideo to Durazno, a distance of a hundred and thirty miles. Other short lines were later built, and in 1884 the Uruguayan general assembly voted in favor of a comprehensive system of rail lines for the country and authorized the president to contract for the building of roads, guaranteeing a certain minimum income per mile. Shortly afterwards a number of railway companies were formed in England, and a network of steel roads began to appear on the undulating surface of the Oriental Republic of the Uruguay. By 1891 a thousand miles were in operation, and by 1928 the roads totaled about sixteen hundred miles. Most of them were controlled by the Central Uruguay Railway Company, an English corporation, whose lines radiated in fan shape from the capital, the longest one connecting with the Brazilian frontier at Rivera. After about 1921 motor traffic began to compete rather seriously with railroads, and attention was given by public authorities to constructing paved highways for public omnibuses and private automobiles.

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[1] In 1909 Brazil gave up by treaty the monopoly of navigation on the Yaguarón and Lake Merim which it had enjoyed since 1851, and recognized Uruguay's joint right to these waters.

Improved methods of land transportation have tended to stimulate tillage. This was practically nonexistent when the war with Paraguay ended; but some interest was stimulated in it through the establishment in 1871 of a little school of agriculture at Palmira by the Spanish agronomist Juan de Cominges, and through his publication of a treatise on general agriculture a few years later. At about the time Cominges's work came out, grape-growing on a commercial scale was successfully attempted; and this industry grew. Toward the end of the century the cultivation of wheat, oats, barley, and flax became of some importance under the stimulation of a number of modern agricultural schools and of government efforts to break up large ranches into small farms owned by those who cultivated them. Wheat-growing, in particular, showed expansion; in 1885 the country imported most of the flour it needed, but twenty years later it was beginning to export the commodity. As late as 1925, however, only one fourth of Uruguay's area was under cultivation.

An activity subsidiary to tillage had also reached some importance. This was the growing of forests under government encouragement through the awarding of annual prizes; for the natural forest area of the country was comparatively small. The work of afforestation began about 1890 with the setting out of maritime pines along the east coast to hold down the shifting sands and reclaim the soil, and by the planting of eucalyptus trees in the country as a whole. Now most of the farms and ranches have a few acres of eucalyptus forest connected with them, and scattered here and there over the country are areas miles in extent which are covered with these trees.

Dairying is the chief industry in the Colonia Suiza ("Swiss Colony") in the southwest, founded in 1862, but plays little part in the country as a whole.

For a time sealing on the Lobos and other islands off the southeast coast was a rather important minor industry and was carried on by private individuals under contract from the government; but in the eighteen-nineties, when more than twenty thousand seals a year were caught, it reached its peak; by 1907 the catch had fallen to about ten thousand.

The most important economic industry of Uruguay is and always has been ranching. All kinds of live stock are raised, but the most important are sheep and cattle. Until after 1870 practically nothing had been done to improve the breeds; but near the turn of the century rapid progress was made in this regard, and for about twenty years Uruguay has been shipping blooded stock to European markets. Yet, while the quality of animals has been improving and the tilled acreage of the country has increased, there has apparently been little or no falling off in the numbers of live stock raised, which in 1925 included 11,500,000 sheep and more than 8,000,000 cattle.

The manufacturing industries of the Oriental Republic are chiefly connected with the working up of food products, especially wine-making, flour-milling, and the preservation of meat; but there is some weaving of textiles, including a fine quality of woolen blankets. The "jerking," or drying, of meat, an old industry, expanded with cattle-raising, but later it was supplanted to some extent by more modern methods. In 1861 a Liebig's extract-of-beef factory was established near the town of Fray Bentos on the Uruguay River, and appears to have been the first foreign factory scientifically operated in Uruguay. Later came meat canneries, and then plants for chilling and freezing meat. The largest meat-packing establishments in Uruguay are branches of companies having their headquarters in Chicago. One of the important industries growing out of cattle-raising for food is the tanning of hides.

The chief exports of Uruguay are wool, hides, live stock, tallow, wheat, flour, flaxseed, and preserved meats of various sorts. In 1927 the value of the exports of the country was $100,500,000, more than seven times those of Paraguay, more than five times those of Ecuador, and considerably in excess of the products shipped out by Venezuela.

Like its neighbors, the Oriental Republic has had serious financial troubles, caused by reckless borrowing, the waste of war, and governmental extravagance and corruption. Repeatedly it has been unable to meet the interest on the foreign debt, and adjustments with creditors have had to be made. Because of the country's inability in 1891 to pay the interest on its debt, amounting to nearly ninety million pesos, the guaranteed interest to the railroad companies was cut down from 7 per cent to 3½ per cent and nearly half the customs revenues was assigned to meet the debt service under the new arrangement. After about 1910 the interest payments were regularly met.

It should be added that as regards its obligations to Brazil under the loan treaty of 1851 the little buffer state fared very well, for by a treaty made between the two in 1918 Uruguay was excused from paying any of the enormous sum due to accumulated interest and Brazil undertook to expend the principal (five million pesos) on public works or institutions to be erected on the frontier between the two countries for the benefit of both.

During the first enthusiasm over independence an educational movement began in Uruguay; but it was quickly paralyzed by the disorders which befell the country, and little was done again until after 1870. When educational revival did come it was largely through the efforts of José Pedro Varela, who, in consequence of a visit to the United States, was much impressed with the school system there. In the early eighteen-seventies he formed the Sociedad de la Educación Popular and wrote a book on the principles of education and another on school law. Varela's influence was strongly felt, and in 1877 a public-school system was established with facilities for technical as well as general training. A few years later the University of Montevideo was founded. In the second decade of the twentieth century advancement was more rapid, for larger funds were available for education. The compulsory-school-attendance law began to be enforced, and educational facilities expanded to meet the needs of the population. Modern methods were introduced in all branches, and much attention was paid to physical training, which had been introduced into the country. The result was great national interest in sports and the establishment of children's playgrounds in practically every village. By 1928 national illiteracy had been reduced to about 40 per cent and girls were enjoying practically the same educational opportunities as boys.

XXIX

THE ARGENTINE NATION

Cada cabildo era la tradición local del amor de la niñez, de la juventud, y de la edad madura, al tañido de la campana de la aldea madre: ésa es la explicación lógica de nuestra historia.—Ernesto Quesada, *La Época de Rosas*, pp. 33–34

FOR more than fifty years the most vexatious problem facing the political leaders of the Plata basin was that of governmental organization. Should federalism or centralism dominate? The influences which touched the region during the colonial era gave a strong bent toward provincialism and decentralization. It was settled from four different sections—Chile, Peru, Paraguay, and Spain. For most of the period it had no real commercial center and no political capital: the dawn of independence was near at hand when the port of Buenos Aires was permanently opened to trade and when the first viceroy was stationed there. Long before these changes took place the self-sustaining, conservative gauchos scattered over the great stretches of pastoral back country had, as Ernesto Quesada has pointed out, come to look to the cabildo of the nearest city or town as the most important political influence. They had developed a mental outlook fitting them for federalistic government.

But the movement for independence began in the city of Buenos Aires, where an aristocratic, centralistic policy was natural, owing to the tradition there of viceregal authority. Furthermore, the *porteños*, or inhabitants of the port city, were superior in education and culture to those of the back country and were keenly aware of the fact; hence they not only favored a strongly unitary government but planned to be themselves the dominating influence at the center of it. They had a serene conviction that they were infinitely better qualified to rule the land than were the unsophisticated folk of the provinces, for whom they accordingly planned a very minor governmental rôle.

THE EARLY PERIOD OF TURBULENCE

It was not long before the centripetal and centrifugal political principles began to cause discord and to threaten anarchic disaster. It was in the desperate hope of holding the Plata territories together, as will be recalled, that the Buenos Aires leaders convened a congress in the heart of the back country, Tucumán, in 1816. Here independence from Spain was tardily voted, and a form of government was discussed. This brought out the fact that various delegates favored monarchy;[1] but there was also a strong republican element, and in the face of the critical condition of the war for independence the question was for the time left unsettled. Juan Martín Pueyrredón was merely named "supreme director," and no constitution was adopted until early in 1819.

The one that then went into effect was something of a compromise in that it provided for a republican form of government, but one strongly aristocratic and centralistic. The executive was still called the director, and Pueyrredón was renamed to the office. This constitution, which was largely disregarded, was important chiefly through adding to the existing disorder by being the cause of civil war between its supporters, the leaders of Buenos Aires province, and its opponents, those from various other parts of the disorganized country. The mere promulgation of the constitution added to the turbulence, especially in the northwest, where the provinces were already acting with complete autonomy. Pueyrredón, finding himself quite incapable of reducing the political chaos to anything resembling the organization called for by the new constitution, repeatedly offered his resignation. Congress for some time refused to accept it, but finally in July, 1819, it permitted the harassed executive to retire.

Three months later irate caudillos of the provinces of Entre Rios and Santa Fé declared war against the "despots" of Buenos Aires and began to march against them with the avowed object of insuring the liberty and equality of which they believed the recently adopted constitution aimed to rob them. Four other interior privinces—Córdova, San Luis, San Juan, and Mendoza—soon joined the Federalist belligerents. This opposition was too much for Buenos Aires, at the time greatly handicapped by internal political disorders, and by the close of 1820 peace had been made, with victory for the Federalist element. This really meant that during the next few years the various provinces, without the formality of secession, acted with complete independence. Most of them pursued a very turbulent course.

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[1] Two years earlier the leaders in Buenos Aires had favored a monarchy under British protection, and agents had been sent to Europe to try to secure a sovereign of royal blood; but nothing came of the plan.

In Buenos Aires, however, there was a marked change. In the year 1820 that province had had nine different governors, three of them serving in one day; now, at peace with its neighbors and for the time free from the ambition to dominate them, it had a short period of orderly government in which much progress was made. An able man, Martín Rodríguez, was chosen governor, and he named as his ministers leaders of exceptional type. The most remarkable of them was Bernardino Rivadavia, an Argentine creole of Italian descent who, after several years spent in Europe, had returned home fired with the desire to foster the development of his country. Rivadavia was largely responsible for a number of wise measures. An amnesty law, permitting the return of political exiles of Pueyrredón's period, was passed. Some of the numerous monasteries were suppressed and others were limited, tithes and Church courts were abolished, and cemeteries were secularized and removed from the crowded part of the capital. Considerable was done toward fostering economic development: immigration was stimulated, agriculture was aided by the introduction of new breeds of sheep, improvements were begun in the harbor of Buenos Aires, and a bank of discount was established. Plans were laid for a public-school system of modern type, with the University of Buenos Aires, established in 1821, at its head. Connected with the university was a preparatory school. The elementary schools were increased in number, and provision was made for educating girls as well as boys.

In fact, Rivadavia's liberalism caused him to regret the vague, restricted, inferior position occupied by the women of the country. He planned to have them play a larger part in national life in general and decided to begin the reform by placing in their charge all benevolent and charitable work. With this in view, in 1823 he helped them to organize themselves into a Sociedad de Beneficencia, which was to work under government inspection and in some ways to take the place of the Sisters of Charity, from whose control various benevolent institutions had recently been taken.

Meanwhile the vexed question of relations between the various political units of the Plata again loomed large. Since the bitter wars of 1820 the provinces had kept up a vague fiction of common nationality with the hope of soon reuniting on a basis acceptable to all. None of them appears to have considered remaining independent indefinitely, for the danger from the outside, especially from Brazil, was too great. This fact was felt most by those open to attack through situation on the coast or along the lower washes of the great rivers near the Brazilian frontier. Hence in January, 1822, the provinces of Santa Fé, Entre Ríos, Corrientes, and Buenos Aires signed a treaty of peace, friendship, and union, and agreed that the exposed Misiones territory should be under the special protection of Santa Fé. This treaty was intended to form a basis for the general restoration of former political ties.

Accordingly a constituent congress of delegates from the various provinces met at Buenos Aires in December, 1824. Shortly afterwards the gathering adopted resolutions favoring reunion and providing that a new constitution should be prepared which should be adopted only after being approved by the provinces. Discussion followed regarding the conflicting principles of centralism and federalism, and someone made the unfortunate suggestion that the provinces be asked to vote in advance upon which form of constitution they preferred. Some strongly urged that this be done; others wished the new basic law to be completed before a provincial vote was taken. As the debate proceeded factional feeling increased.

While the discussion was getting under way a situation developed on the other side of the Plata which gave considerable concern to the provincial leaders. The conquest of the Banda Oriental by Brazil in 1820 had caused both resentment and alarm among them. The revolt against imperial rule started by the Thirty-three in April, 1825, had serious potentialities for trouble to the provinces represented in the congress at Buenos Aires, especially since the leaders had been refugees in that city. Precautionary measures were desirable; and the gathering voted to station an army of observation under Martín Rodríguez (who had been replaced by another as governor of Buenos Aires) on the west bank of the Uruguay. Since Buenos Aires was the only one of the provinces having spare funds, a loan was secured from it for the support of the joint forces. Later in the year, as has been stated, the gathering at Buenos Aires responded favorably to the action of the Uruguayan congress at Florida in favor of union with the Plata provinces. It soon also admitted a delegate from Uruguay. Hostile notes between Brazil and the congress sitting at Buenos Aires followed, and the latter broke off diplomatic relations with the empire on November 4, 1825.

A few days afterwards the congress voted to double its membership in order to have a strong, efficient national organization for prosecuting the war with Brazil. The decision was referred back to the provinces, which gave their approval; but before additional delegates could be sent the existing representatives, on February 6, 1826, voted in favor of an executive to be called "president of the United Provinces of the River Plata," and on the following day they elected Rivadavia to the office.[1] The new executive, who was a strong centralist, or Unitarian, was accused by his enemies of bringing about the premature election lest his desire to be president should be frustrated by the presence of additional delegates who would have increased the Federalist sentiment of the congress. His friends declared, in his defense, that whatever part he played in connection with the election was due to anxiety for the safety of the United Provinces in the face of the Brazilian peril. Bernardino Rivadavia was probably both ambitious and patriotic. One of his first acts as president was apparently intended to create general harmony and solidarity. This was the promulgation of a law passed by congress nationalizing the province of Buenos Aires and abolishing its local government. The change, however, merely added to the disaffection roused by the circumstances of Rivadavia's election.

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[1] Rivadavia had recently returned to Buenos Aires after a diplomatic mission to France and England.

In the interest of pushing the war against Brazil the congress tried, for a time with success, to avoid discussion of the delicate question of permanent political organization. In the midwinter of 1826, July 14, the subject was insistently thrust to the fore; consequently, since the supplementary deputies had by this time arrived, a committee was appointed to draw up a new constitution. The group responded by framing a highly centralistic one on the model of that of 1819, and reported it to congress on September 1. Heated debates followed, but in the end congress indorsed the document. According to previous agreement its final adoption was to be determined by vote of the provinces. So great was the fear that Rivadavia would force the Unitarian constitution upon the country that before local governments had a chance to pass upon it opposition in the northern provinces had begun to show itself by uprisings followed by civil wars within the provinces and between them.

This political hurly-burly greatly handicapped Rivadavia in his conduct of the war against Brazil, but by April, 1827, some advantage had been gained in the struggle with the empire. Brazil was unwilling to make peace, however, except on the basis of retention of the Cisplatine Province. So bad was the local situation that Rivadavia apparently decided to acquiesce; but he later repudiated a preliminary treaty made on these terms because of strong popular opposition to it. Yet he was convinced that no decisive victory could be won over Brazil while civil war raged at home, and he was unwilling to settle by force the domestic political question, or felt incapable of doing so; hence, in July, 1827, he resigned his office and left the country.

This brought about an abrupt change in the Argentine political situation. Rivadavia's interim successor dissolved the national congress and restored the autonomy of Buenos Aires, which elected as its governor Manuel Dorrego, who had been the special champion of federalism against Rivadavia. Late in 1828, as was stated in Chapter XXVIII, peace was made with Brazil and, largely owing to British influence, the Cisplatine Province became the independent republic of Uruguay.

Very soon new troubles began in Buenos Aires. In December, 1828, shortly after the return of the Argentine troops from Uruguay, a rising against Dorrego took place under the lead of Juan Lavalle, a Unitarian officer of the army who felt that he had been slighted. Dorrego was defeated in battle and imprisoned, and shortly afterwards was shot at the order of Lavalle, who had been proclaimed governor of Buenos Aires. All the other provinces except Salta and Tucumán denounced Lavalle's conduct and turned against him; in April, 1829, he was overthrown, and soon afterwards he left the country.

"THE AGE OF ROSAS"

Now began what came to be called "the Age of Rosas," named for Juan Manuel Rosas, who dominated Argentine affairs for about twenty years. This extraordinary man was born in Buenos Aires City in 1793 of a rather distinguished Spanish creole family. His early years were spent on his father's large *estancia*, or ranch, in the southern part of the province of Buenos Aires, but later he returned to the capital to attend school for a few years. According to his own account he began to support himself at the age of fifteen, and when only twenty-two he established to the south of the capital the first *saladero*, or meat-salting plant, in his native province. He lived in gaucho fashion, was intelligent and hard-working, and before many years had passed was the owner of extensive lands, great herds of cattle, and numerous saladeros on the pampa in the region of the Salado River. As an influential ranchman he stood for law and order in his section of the province and was the idol of his gaucho employees, whom he led in campaigns against the marauding Indians of this frontier section.

In the turbulent days of 1820 he went to the aid of Governor Rodríguez when a revolutionary movement was started against him, and after Dorrego was killed he fought Lavalle and was largely responsible for his overthrow. In December, 1829, the legislature of Buenos Aires elected Rosas governor and captain-general of the province for three years. At this time the civil war between Federalists and Unitarians precipitated by Lavalle was still raging, and continued for a year and a half, during which Rosas was the strongest personality on the Federalist side. When the struggle ended he gave up his office and for a year waged an exterminating warfare against the hostile aborigines of the southern part of the province, making possible the advance of settlement in that direction and greatly adding to his popularity, especially among the gauchos.

In 1834 the provincial legislature repeatedly offered him the position of governor, and repeatedly he refused it. In May, 1835, after the incumbent had declared the province ungovernable, the legislature again named him to the position, but this time with dictatorial powers. Rosas now agreed to accept if a plebiscite made clear that the people desired him to have absolute authority. The vote was taken and strongly indorsed the action of the legislature. Sure of his position, Rosas assumed office.

Used to strict regard for law and order on his own estates, he had apparently been unwilling to assume charge of a political hurly-burly unless given autocratic power. Moreover, he fully realized that the provinces were not yet ready for self-government of any sort. Apparently for this reason, after being given full authority he put off those who urged the calling of a constitutional convention, with the excuse that the time was "inopportune"; but he formed the so-called Argentine Confederation by inducing most of the provinces, by force or by diplomacy, to recognize him as the general head of the group with control over external relations. He ruled the province of Buenos Aires with the aid of a few ministers, occasionally supplemented by a subservient legislature; and in much the same way other caudillos controlled other provinces of the loose confederation. Some of the local governors were his specific appointees, and those who came to office otherwise usually went to some pains to get and keep his favor. Against all who opposed him he waged bitter war, denouncing them as "Unitarians" regardless of their actual political affiliations. The parts of the country giving him most trouble were the provinces of the northern littoral, one of which, Corrientes, succeeded in remaining fairly independent of all efforts from Buenos Aires to dominate it.

Rosas waged special warfare from the first against the Unitarians in his own province, as did his caudillo governors within their jurisdictions. The proscription of this political faction began in 1829 after the downfall of Lavalle, but became much more severe after Rosas was made dictator. Those who favored political centralism or opposed the dictator had their property confiscated and were hunted down like wild beasts. Thousands fled the country, taking refuge especially in Chile and Uruguay, as has been mentioned; within the safety of these asylums many of them plotted and planned against the tyrant. It has been estimated that at least thirty thousand Argentines were in exile in the year 1843, when the terror was at its height.

Those who wished to be safe and to show loyalty to the dictator were ordered to wear ribbons of the Federalist red, bearing the party slogan "F. O. D. Long live the Argentine Confederation! Death to the filthy, loathsome, savage Unitarians!"[1] Rosas's supporters, said the tyrant's enemies, were marked like cattle. Men were required also to wear red waistcoats. The houses in which Federalists dwelt flew red flags, and unusually loyal, or cautious, members of the party had the buildings painted outside with a border of the same hue about a yard wide. Shops in the city of Buenos Aires were prohibited from carrying articles of blue, the Unitarian color.

In the various towns Rosas's most ardent supporters formed

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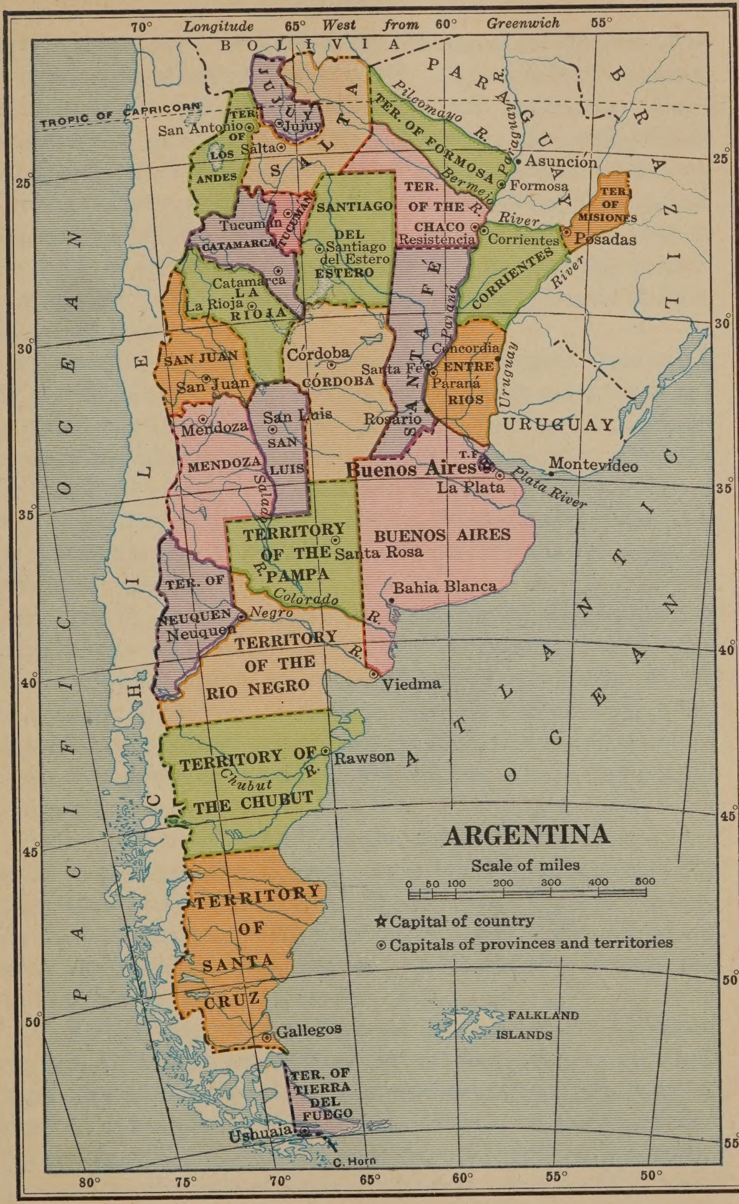
[1] *Federación ó muerte! Viva la Confederación Argentina! Mueran los salvages, asquerosos, inmundos Unitarios!* The Unitarians were called savage because they favored limiting the power of the Roman Church. Great numbers of these ribbons are to be seen in the museums of Argentina.


70° Longitude 65° West from 60° Greenwich 55°
BOLIVIA
PARAGUAY
BRAZIL
TROPIC OF CAPRICORN
JUJUY
Jujuy
SALTA
Salta
TER. OF LOS ANDES
San Antonio
Pilcomayo R.
Paraguay R.
TER. OF FORMOSA
Formosa
Asunción
Bermejo R.
TER. OF THE CHACO
Resistencia
TER. OF MISIONES
Posadas
Corrientes
CORRIENTES
River
Paraná River
TUCUMAN
Tucuman
CATAMARCA
Catamarca
SANTIAGO DEL ESTERO
Santiago del Estero
LA RIOJA
La Rioja
SANTA FE
Santa Fe
Paraná
Concordia
ENTRE RIOS
Paraná
Uruguay
URUGUAY
SAN JUAN
San Juan
Córdoba
CÓRDOBA
Rosario
San Luis
SAN LUIS
Mendoza
MENDOZA
Salado
T.F.
Buenos Aires
La Plata
Montevideo
Plata River
TERRITORY OF THE PAMPA
Santa Rosa
BUENOS AIRES
Bahia Blanca
Colorado R.
TER. OF NEUQUEN
Neuquen
Negro R.
TERRITORY OF THE RIO NEGRO
Viedma
TERRITORY OF THE CHUBUT
Chubut R.
Rawson
TERRITORY OF SANTA CRUZ
Gallegos
TER. OF TIERRA DEL FUEGO
Ushuaia
C. Horn
FALKLAND ISLANDS
CHILE
PACIFIC OCEAN
ATLANTIC OCEAN
25° 30° 35° 40° 45° 50° 55°
80° 75° 70° 65° 60° 55° 50°
ARGENTINA
Scale of miles
0 50 100 200 300 400 500
☆ Capital of country
⊙ Capitals of provinces and territories

secret groups, each one known, for the supposed cohesion of its members, as a *mazorca* (ear of corn). These busied themselves in hunting out and exterminating political opponents. Many bloodthirsty, vicious individuals belonged to the organization, but some members were persons of lofty, patriotic intentions. The organization was a sort of Argentine Ku-Klux Klan, primitive and barbarous. Many thousand persons lost their lives at the hands of the mazorca. So zealous were its members in their hunting and killing of men that Rosas himself is said to have restrained them.

It is probable that the organization was largely responsible for establishing a cult of Rosas, which the dictator, who was in many ways a modest man, permitted from policy. Propagandists had likenesses of him placed in the churches, and from the pulpits the priests exhorted their charges to honor and obey him. At public celebrations prominent citizens drew a triumphal car containing his portrait while the humble masses knelt in worshipful attitude.

In general, the most ignorant elements of the population were Rosas's loyalest supporters; but during most of his régime he probably was really favored by the majority of the inhabitants, including foreigners, who appreciated the comparative peace maintained by the tyrant and the protection to life and property enjoyed by those not the dictator's political opponents.

Partly from conviction as to the merits of the Church and partly to gain its aid in maintaining control, Rosas restored the rights taken away from it under the Rivadavia régime. He also admitted the Jesuits to the country and gave them charge of university instruction, but later they were exiled—for refusing to place his portrait in their churches.

Despite the temporary aid of the Jesuits, the era of Rosas was one of serious educational and intellectual retrogression. Practically nothing was done for elementary schools, various branches of higher learning were abolished, and the remainder were made moribund by strict political and religious censorship. Furthermore, the exile of Unitarian leaders was in itself a severe blow to the intellectual life of the nation, for they formed the most cultured element in it.

In other regards progress was but slight. There was little immigration, though some British and a larger number of Spaniards—mostly defeated Carlists from the northern provinces—came to the country. The former engaged chiefly in ranching; the latter settled in Buenos Aires and became merchants. The dictator made a treaty with England abolishing the African slave trade; but this probably had little effect upon the economic life of the country, for Negro slaves were never greatly in demand in Argentina, as rural labor was largely performed by the humble element among the gauchos. Stock-raising continued to be the chief industry, and the exports of the country were largely restricted to hides, wool, horsehair, and jerked meat.

In his foreign relations Rosas was very aggressive, as was indicated in Chapter XXVIII. One of his first diplomatic clashes was connected with the Falkland Islands, or Malvinas, to which the Argentine Confederation laid claim as heir to a rather questionable Spanish title. In 1831 two sealers from the United States were seized at the islands by Argentine authorities on the ground that they had violated the fishing laws. This was retaliated for by the breaking up of a settlement on one of the islands by Captain Duncan of the United States vessel *Lexington.* Two years later British officers hauled down the Argentine flag on the Malvinas and hoisted their own national colors. Angry protests followed from Argentina, and attempted defense of their claims by both nations. In 1839 Rosas tried to secure from the United States payment for damages done to the Argentine settlers by Captain Duncan; but the American government refused, on the ground that the Argentine claim was disputed by Great Britain because of rights gained by the latter previous to 1833. As a matter of fact the British title was secured, through coercion of Spain, before the close of the eighteenth century.

The friction between Rosas and England and France leading to the blockade of the Plata has already been mentioned, and also the insistence with which he clung to the view that both Paraguay and Uruguay were but straying members of the Argentine Confederation and must be brought back to the political fold. It was partly the constant confusion created by these foreign quarrels and by the dictator's long war against Uruguay which caused Justo José Urquiza, governor of Entre Ríos and formerly one of Rosas's most loyal supporters, to turn against him; but the latter also resented Rosas's commercial discriminations in favor of Buenos Aires. On May 1, 1851, Urquiza issued a proclamation declaring war against the despotism of Rosas and promising liberty and the organization of a federal republic. A few weeks later a treaty of alliance against the tyrant was signed by Brazil, Uruguay, and the Argentine provinces of Entre Ríos and Corrientes. Rosas fiercely denounced Urquiza as a "ruthless Unitarian" and prepared to meet the allied forces, which, twenty-four thousand strong, crossed the Paraná in the following January and advanced toward Buenos Aires. On February 3, 1852, his red-coated army was decisively defeated at Monte Caseros by the troops led by Urquiza. Immediately afterwards Rosas wrote out his resignation, in which he declared that he had done his utmost for the support of Argentine independence, integrity, and honor. He then left with his daughter Manuela for exile in England, where he died at Southampton on May 14, 1877.

Juan Manuel Rosas has been a puzzle to many students of Argentine history. Some have attributed to insanity the extreme and extraordinary acts which characterized him as dictator. Charles Darwin, who met him in 1833 while on the voyage of the *Beagle*, mentioned Rosas's gravity as being carried to a "high pitch"; and certainly the tyrant's lack of a sound, wholesome sense of humor invited fanatical extremes. Some of his most fantastic acts, however, show him much less a madman than a keen politician and a shrewd practical psychologist. Having once become dictator, he liked the position and desired to retain it; and he succeeded in doing so partly by an excessive use of violent epithets against the opposition and, in general, by a system of propaganda well suited to win the support of an unschooled, emotional people. Rosas was no more insane than is Benito Mussolini, the dictator of Italy.

Though the régime of Rosas was empty and retrogressive in many respects, constitutionally it marked an important step in Argentine history. By holding most of the provinces together by constant stress upon federalism—though it was only a shibboleth—and by boldly championing national rights against the alleged injustices of foreign powers, Rosas inspired the population with something of a national consciousness. Though he never found an "opportune" time for drawing up a federal constitution, at the end of his rule the population was much better prepared to make federalism work than it was at the beginning.

THE CONFEDERATION AND THE "CAPITAL QUESTION"

Urquiza, who in the interest of national solidarity had declared a general amnesty immediately after Rosas's elimination, set promptly about introducing a constitutional government of federal type. A constituent congress was called to meet in Santa Fé late in 1852; but after the delegates had assembled, only thirteen of the fourteen political units were represented. Buenos Aires remained aloof. This richest and most populous of the provinces was probably glad to be rid of Rosas, even though he had been born in Buenos Aires and had made it the dominant political unit of the confederation. Urquiza, however, was a provincial upon whom the proud porteños looked with suspicion as well as contempt, for they believed him to have despotic aims which, if realized, would mean the domination of the country not from Buenos Aires but from Entre Ríos or some other interior province. Buenos Aires was still Unitarian in sentiment and still desired to be the pivotal part of the nation. In the opening address of Urquiza, which was read before the Santa Fé congress, allusion was tactfully made to the absence of the porteños as a "transitory accident." The address added, however, that in the Argentine flag "there is space for more than fourteen stars; but not one star may be eclipsed."

The constituent congress as a whole was made up of able men who took their task seriously. In preparation for it they had studied the constitution of the United States and the long-discarded Unitarian document of 1826; and some of them were acquainted with Alexander Hamilton's *Federalist*. Greater aid came from Juan Bautista Alberdi, a native of Tucumán who was well known through his writings as a deep, impartial thinker. Just as the convention opened, Urquiza received from Alberdi a copy of his recently published book, entitled *Bases y Puntos de Partida para la Organización Política de la República Argentina*. Though influenced by the basic law of the United States, the work contained a clear discussion of the actual problems facing the gathering of constitution-makers. Consequently they requested him to prepare the draft of a constitution, which he did; and this, after various changes by the congress, was adopted by it and proclaimed by Urquiza in May, 1853. With some amendments, it has served the Argentine people down to the present time.

Though much influenced by Alberdi, it also drew directly from the two constitutions referred to above, and represented a blending of Unitarian and Federalist principles which painful experience seemed to make necessary. Alberdi's view that the constitution should be framed to meet existing needs rather than needs which might arise in the future caused the new basic law to be more centralist than that of the United States. This was achieved by specifically delegating to the national congress more extensive powers than the constitution of the United States does, and by authorizing the federal authorities to intervene in the provinces to preserve republican rule; but the latter were empowered to elect their own officials. A bicameral congress was provided, with the upper house representing the provinces and the lower one the people. The president was to be chosen for six years by provincial electoral colleges, and he was authorized to appoint the members of the federal courts with the consent of the senate. Roman Catholicism was made the state religion, and slavery was abolished.

By an amendment added in 1860 the term "Argentine Nation" was adopted as the official designation of the state.

In November, 1853, Urquiza was elected first constitutional president of the confederation. He assumed office in the following March, establishing his capital at Paraná, in his own state of Entre Ríos. Buenos Aires, unwilling to accept mere equality with the other provinces, continued aloof, and Urquiza wisely permitted it to do so; but a treaty of peace, commerce, and common defense was made between it and the confederation looking to future reunion through settlement of the vexed question of division of political power. The remaining provinces soon framed constitutions which were acceptable to the central government, and all settled down to peaceful development. Urquiza on the whole showed himself broad-minded and forward-looking. A visitor of the time described him as a "very respectable English farmer-looking man," and he was actually one of the largest cattle-raisers of the country; hence economic interests especially attracted him, and he made a serious effort to promote commerce and immigration. Numerous commercial treaties were made with foreign countries, and the Paraná and Uruguay rivers, closed by Rosas, were opened to the vessels of all nations, a policy guaranteed by formal agreements with the United States, France, and England.

Even while serving only as provisional executive before the constitution was adopted Urquiza made arrangements with an immigration agent for bringing to Corrientes European agricultural colonists, who were to be offered liberal terms. The settlers began to arrive in 1855. The next year more than two hundred Swiss families were brought over and founded Colonia Esperanza in Corrientes. In 1857 the colony of San José, in Entre Ríos, was founded by European immigrants, who were given tracts of land, live stock, and money with which to buy seed, tools, and lumber. The most successful of the settlements made at the time was Colonia Esperanza, which took root and prospered; the others, despite government aid, tended to languish.

Though especially interested in material progress, Urquiza recognized the need for public education, which was practically nonexistent, and aided it through national subsidies to the provinces. The government of the confederation, to provide higher training for all the provinces, nationalized the University of Córdova and the Colegio de Monserrat in the same place.

Independent Buenos Aires, with its superior harbor and its returned Unitarian exiles, was making better economic and intellectual progress than the provinces of the confederation. A number of railroads were begun, the first in the whole Argentine opened for traffic being the Buenos Aires Western, on which in 1857 an English engine, the *Volenta*, drew a train the six miles from the capital to the town of Flores. Agriculture expanded, commerce made marked increase, and some of the surplus money thus obtained was employed toward restoring and improving the schools of the province.

Unfortunately, feeling toward the confederation grew worse instead of better, partly because in 1856 the latter adopted for Rosario, its chief port, a differential tariff governing European imports which the porteños considered deliberately injurious to them. Early in 1859 the governor of Buenos Aires issued a decree of reprisal. Before the close of the year war broke out between the two, and the Buenos Aires forces were quickly routed. By the treaty of peace the defeated province agreed to incorporation into the confederation, but with the understanding that changes in the constitution would be considered.

Very soon after the end of this short war the political situations changed in the two states. General Bartolomé Mitre, a man of unusual ability, was elected governor of Buenos Aires; and in the confederation Urquiza gave place to Santiago Derqui, who soon quarreled with his predecessor and showed himself unable to dominate the political situation. This weakening of the confederation was probably rather obvious by the time Buenos Aires was ready to elect delegates to the national congress. When the delegates appeared in Paraná to take their seats, they were not admitted, on the ground that their election had not been in conformity with the national constitution. It was later charged that the irregularity was deliberate, with the aim of securing an excuse for war which might result in porteño victory. Basis was given for the accusation by the fact that the Buenos Aires government, instead of providing for a legal choice of delegates, passed a decree annulling the act of union with the confederation. An attempt at peaceful adjustment proving futile, the porteños, aided by some Uruguayan Colorados under Flores, again went to battle with the confederation.

Urquiza led the armies of the latter, and an indecisive conflict took place at Pavón, Santa Fé, on September 17, 1861. This conflict, however, became an advantage to the army of Buenos Aires, commanded by Governor Mitre, because Urquiza, disgusted by lack of support from Derqui, withdrew from the war and from national politics. Derqui also soon resigned, and Mitre assumed provisional charge of confederation affairs. When congress met he tried to settle the constitutional problem by reviving the federalization of Buenos Aires province which had existed under Rivadavia. To this congress was favorable, but the legislature of that province objected. Permanent adjustment was therefore postponed, and a temporary compromise was adopted whereby the port city was to be the national capital for the next five years.

This congress at Paraná was so pleased with Mitre, the former leader of enemy armies, that it gave him a formal vote of thanks and the title *benemérito* (meritorious). In the election of 1862 he was made president of the country. The new executive had been an exile in Rosas's day and had lived and labored in Uruguay, Chile, Peru, and Bolivia. Though interested in politics, he was also distinguished in various fields of writing. After the overthrow of Rosas he had returned to Buenos Aires and founded *La Nación*, which soon became one of the leading newspapers of the continent. He was a man of broad vision and high ideals and took a tolerant attitude toward those holding different political views from himself; but revolts he put down with a strong hand.

With the idea of fostering national unification as well as of developing the country economically, the Mitre administration gave much attention to extending postal and telegraphic service and to building railroads. A contract granted in 1855 by Urquiza to the Argentine Central Railroad Company, headed by William Wheelwright, was modified. The proposed line was to run from

Rosario on the Paraná to Córdova far in the interior. To aid in building it, the government gave the company a strip of land about three miles wide on either side of the track, with the stipulation that the land must be colonized, and guaranteed an interest of 7 per cent on the company's capital. In 1863 the laying of track began, and the line advanced slowly over the pampa, finally connecting the two cities in 1870. In the same year began energetic and efficient colonization of the railroad land.

Important work in the interest of commerce was done early in Mitre's administration through the adoption of a commercial code in 1862 and through the revision of the tariff laws in 1863 by Dalmácio Vélez Sársfield, minister of hacienda. This resulted in a doubling of the national revenues from European imports.

Unfortunately for the continued progress of the country, the war between the triple alliance and Paraguay began in 1865. Furthermore, President Mitre's election as commander in chief of the allied armies took him away from his executive duties until early in 1868, when the death of the vice president caused his return to Buenos Aires. By this time his prestige had been considerably injured; for the war was unpopular in Argentina from the first, and it had already lasted longer than Mitre had believed that it would.

The question of his successor had begun to be discussed fervently before the end of 1867, and several candidates had appeared. Among these were Urquiza, supported by the northern provinces, and Adolfo Alsina, governor of Buenos Aires, which had split into two factions over the question of the national capital. It seemed unlikely that any of the men already in the field could control a majority of the electoral votes, so a movement was started in the west in favor of Domingo Faustino Sarmiento as a compromise candidate. Sarmiento, a native of the province of San Juan, had been imprisoned and exiled by Rosas and had spent some time in Chile in journalistic and educational work. After the fall of the dictator he engaged in the same activities in his own country and also filled some important political offices. When he was suggested for the presidency he was Argentine minister in the United States, where he took a lively interest in educational matters.

After much discussion a combination was made between the provincial supporters of Sarmiento and the Alsina element,—which had most of its support in Buenos Aires,—the former being named for president and the latter being given the second place. Sarmiento refused to return home to participate in the campaign, but won seventy-nine out of one hundred and thirty-one votes, including twenty-four from Buenos Aires and all the votes from Córdova, Jujuy, Rioja, San Juan, Mendoza, and San Luis. The ballots from Tucumán, which also favored him, did not arrive in time to be counted. The election took place on August 16, 1868; but it was not until some days later that the successful candidate, on his way home from the United States, learned at Montevideo of his victory.

As president, Sarmiento proved unusually energetic, intelligent, independent, and progressive—qualities later displayed by Theodore Roosevelt. Like Roosevelt also, he had almost boundless self-confidence and was unusually pugnacious; therefore he made serious mistakes and many enemies, but he accomplished much of solid worth. In selecting the members of his cabinet the new president quite ignored the supporters of Mitre, thereby causing resentment from that faction and encouraging later revolt. He showed more tact with reference to the "capital question," which confronted him upon his accession. In previously discussing the matter he had favored the building of a new capital or the removal of the seat of government from Buenos Aires to some other city; but in 1869 he vetoed a bill for its transfer to Rosario, for he now felt that this proposed solution would never be assented to by the porteños and would lead to national disintegration and civil strife.

This would have been unfortunate at any time, but especially calamitous with the war against Paraguay still going on. That struggle, which continued for a year and a half after the new administration came into power, was a drain upon the population and upon the finances of the country. When it was ended, strained relations developed with Brazil owing to the jealousy between the two over land claims against Paraguay; but these were somewhat abated in 1872 through the efforts of Mitre, who was sent to Rio de Janeiro to bring about an understanding. The territorial settlements made between Argentina and Paraguay have already been mentioned (p. 626).

A few weeks after the end of the war with Paraguay trouble confronted the Sarmiento administration at home because of a peculiar situation which had developed in Entre Ríos, where Urquiza, the defeated presidential candidate, was again governor. For a time after the national election there was fear in Buenos Aires that the former president would not accept the outcome and would lead a revolt; but he finally decided upon a friendly policy toward the administration, and this was made certain by a visit of Sarmiento to the mesopotamian caudillo in January, 1870. In connection with the festivities with which he honored his guest, however, General Urquiza—by way of a hint that the semi-independent position of Entre Ríos must not be interfered with by the national authorities—reviewed his army of fifteen thousand men.

It was this display of friendliness on the part of Urquiza toward Sarmiento, armed though it was, that led to trouble; for in Entre Ríos there was deep dislike for Buenos Aires, and the demonstrations of good will toward Sarmiento on the part of the governor of the state appeared to some like treason. This fact was seized upon by López Jordán, an ambitious and unscrupulous army officer of Urquiza's, who, on the night of April 11, 1870, entered the governor's palace with a band of ruffians and murdered him in cold blood. Three days later the provincial legislature, evidently persuaded that Jordán's act had saved Entre Ríos from Unitarian tyranny, elected him governor in Urquiza's place. The crime served to show that the Argentine people were advancing in civilization and national spirit, for there was general resentment against Jordán outside his own province, and Sarmiento had almost unanimous support of congress in his determination to oust and punish the usurper, as the constitution authorized. Money was voted for making war upon Entre Ríos, which was declared in a state of siege; but it was not until after nearly a year of hard fighting that Jordán was defeated and forced to take refuge in Brazil.

Before the end of the war against Entre Ríos a new trouble appeared in the form of yellow fever, which broke out in Buenos Aires in January, 1871. A large fraction of the city's three hundred thousand inhabitants fled to adjoining sections, where they remained until the danger seemed over, but more than thirteen thousand porteños died of the disease within five months. During this time industry and commerce were virtually at a standstill in the capital.

This greatly cut down the national revenues for the year; but the financial loss from the fever was less disastrous than the war against Entre Ríos of the year before, which consumed nearly a third of a European loan of thirty million pesos gold obtained for railroad-building and other internal improvements. Yet the government was able to carry out part of its original plans for extending the rail lines of the country. Before Sarmiento's term ended, Córdova and Tucumán had been connected by rail, as had Concordia and Mercedes; and other shorter lines had been built. Telegraphic communications had also been much extended.

One of Sarmiento's early measures was a taking of the first national census in 1869. This showed a population of 1,743,353, of whom more than 211,000 were of foreign birth, a proportion indicating the large immigration since the days of Rosas.

Encouraged by private individuals, the Central Railroad Company, and the government, foreigners continued to arrive, especially from Germany, Switzerland, Italy, and Spain. Most of the newcomers settled in the cities, but some thousands established themselves out on the pampa, especially in Santa Fé and Entre Ríos, where they engaged in stock-raising and to a lesser extent in wheat-farming. The great influx of workers, aided by improved transportation facilities and intelligent tariff laws, did much toward increasing the industrial and commercial life of the country.

The unique contribution of the administration, however, and the one due most to the president himself, was in the field of education. Sarmiento had long held the view that caudilloism and other political ills which harassed and retarded the country were caused by general ignorance, against which he now directed a "veritable cavalry charge" of education. The need for increasing and improving the primary schools was especially great; therefore many new ones were built; and to supply better-trained teachers Sarmiento introduced into Argentina normal schools on the American model and invited a small army of expert women from the United States to establish them. To more advanced education he gave a new and more progressive trend by inviting to the country a number of foreign teachers for the secondary schools and for the University of Córdova, to which an astronomical observatory was added in 1869. In October, 1870, he traveled to Córdova over the newly opened railroad to inaugurate the observatory and to open in that city the first national exposition, which proved a stimulus to national pride and unity as well as to general enlightenment.

In the midst of his many other duties the strenuous president managed to find considerable time for educating his people in the field of political science through acquainting them with the governmental institutions of the United States, which he greatly admired. This he did through articles for the press and messages to congress, and through having the *Federalist* and the constitutional writings of Joseph Story and other Americans translated into Spanish and published.

Despite the decided growth that had taken place in the direction of national solidarity in the preceding twenty years, as the time for the election of 1874 approached strong sectionalism again came to the fore, centering, as formerly, round the question of the relation of Buenos Aires to the rest of the provinces. One element, especially strong in Buenos Aires, was bent upon having a porteño as the next president; another, the Autonomist-National, with support largely from the provinces (particularly from Córdova), looked to Sarmiento to reward their support by favoring a man from the hinterland. The two candidates between whom the electors had finally to choose were ex-President Mitre and Nicolás Avellaneda. The victory went to the latter, a native of Tucumán and at the time minister of justice, religion, and public instruction. Sarmiento had declared his intention to remain neutral in the election, and he probably did so, though he wanted Avellaneda to win; but that candidate himself appears to have taken advantage of his official position to gain votes. This fact caused Mitre to head an uprising, which occurred in September, 1874, even before the new president was inaugurated. It was soon crushed, as was also an insurrection taking place in Entre Ríos two years later.

Except for these two disturbances the term of Avellaneda was quiet and orderly, and progress continued along the lines of the preceding administration. Commercial expansion was especially notable; in the year 1879 Argentina's exports exceeded its imports in value by five million pesos. Revived impetus was also given to immigration, which had fallen off as a result of the Mitre revolt, through the passage of a law in 1876 providing for organized propaganda in European countries to attract immigrants, payment of their passage to Argentina, and substantial aid after their arrival. Later the law was modified to make it a little less generous, but this caused no serious falling off of the stream of foreigners who poured into the country every year, most of them from Italy and Spain. A considerable fraction of these were seasonal workers, but perhaps more than half remained as permanent members of the population.

Another law of 1876 was especially intended to promote the more rapid settlement of the rural districts through permitting individuals to buy as much as eighty thousand hectares of government land; but it contained no provision against the conveyance to one person of titles to many such tracts, and consequently it did much toward the development of soil monopoly in Argentina and the creation of a class of land barons.

In 1878 and 1879 new lands were opened to settlement in the northern part of Patagonia as a result of energetic campaigns waged against the Indians under the direction of Julio Roca, minister of war. This fact influenced national politics in two ways: (1) the province of Buenos Aires claimed all the territory taken from the Indians, thus stirring up in the other parts of the country fear of increased power on the part of the porteños, but it was permitted to annex only about sixty-three thousand square miles, the remainder being organized into *gobernaciones*, or territories; (2) the prestige gained by Roca in the Indian wars made him a very strong candidate for the presidency in 1880, for he had the support of most of the provinces and also of Avellaneda. In opposition to him the porteños nominated Carlos Tejedor, governor of Buenos Aires, who was backed by Corrientes as well as by his own province and also by Mitre.

Early in the campaign the porteño Unitarian element became convinced that Avellaneda aimed to bring about the election of his successor. The provincials now frankly planned to federalize Buenos Aires City. To this the porteños were opposed, and they began to prepare for resistance. Many men of the capital, including officers of the national army, joined the Tiro Nacional, nominally a rifle club, but actually nothing less than a private military organization; through it training for combat went on. The voting for electors took place in April, 1880, with the result that Buenos Aires and Corrientes went for Tejedor, while the rest of the provinces, which controlled the majority of the electoral votes, were for Roca. The results roused the porteño opposition, who were determined that Roca should not triumph, and soon the situation was very tense.

As civil war seemed imminent Avellaneda, his cabinet, and part of the members of congress withdrew in June to Belgrano, a short distance from the capital. Fighting soon followed, most of it taking place in the outskirts of Buenos Aires on July 20 and 21, and many lives were lost on both sides. In the struggle the porteños, who ran out of ammunition, were defeated by veteran government troops under command of Roca. The terms imposed upon the vanquished were mild and liberal: all were required to surrender their arms, and those who had filled civil or military offices were dismissed from these positions.

The brief but bloody struggle made possible the settlement of the "capital question," which had been its basic cause, and this was promptly achieved through high-handed action by the victorious portion of the government. The fraction of congress sitting at Belgrano voted the members remaining in Buenos Aires as no longer competent to fill their offices, and called new elections, which resulted in the return of government supporters. This reconstructed congress voted the elimination of the revolutionary legislature of Buenos Aires province and, by military pressure, secured the election of a body favorable to the national authorities. This accomplished, on September 21, 1880, the congress passed a law, at once accepted by the legislature of Buenos Aires, separating the municipality of Buenos Aires from the province of that name, federalizing it, and declaring it the permanent national capital. The decapitated province built for itself a new seat of government, La Plata.

Thus after seventy years of friction the status of Buenos Aires was at last fixed. And the nation as a whole was pleased with the arrangement; for it seemed logical that the city which had long been the commercial and intellectual center of the nation, and during most of the national period had been the seat of government, should be made the permanent political capital.

RECENT HISTORY OF THE ARGENTINE REPUBLIC

Though the settlement regarding the capital was brought about through a victory of the provincial element which inherited the old Federalist tradition, actually Unitarian principles were dominant in the new administration, for Roca showed, soon after his accession to office, that he believed a considerable degree of power at the center good for national development. With a strong army at his call he maintained order in the provinces. To secure means for the rapid sending of troops to points where they were needed, as well as with the idea of binding the parts of the country together, his administration made railroad-building an important part of its program. In six years the total length of the lines was increased from about fifteen hundred miles to nearly four thousand. Facilities for telegraphic communication were increased in proportion.

National consolidation was also greatly aided by the widening stream of immigration which poured into the country. Nearly a half-million Europeans, mostly Spaniards and Italians, came while Roca was president. Used to monarchical rule and knowing nothing of the merits of federalism, they looked to and supported the national government, from which many of them had received aid making it possible for them to try their fortunes in the New World.

This great flood of foreigners, which supplied skilled and unskilled workers, also stimulated the rapid economic development of the country. As a result the national revenue was almost doubled during this period.

Educational progress failed to keep pace with material advancement, however, for Roca had no great interest in the public-school system. Sarmiento was appointed national superintendent of education; but the choice was not a wise one, for he was now old, his powers were failing, and he accomplished little toward expanding educational facilities.

On the whole, foreign relations were serene during the period; but Roca's minister to Washington, Vicente Quesada, failed in his efforts to secure payment for damages done in 1831 to the Argentines settled in the Falkland Islands—which since 1833 had been under British control. President Grover Cleveland declared the claims of Argentina groundless and refused to submit the question to arbitration, which ended diplomatic discussion of the matter; but there was much Argentine resentment over the virtual support by the United States of the British occupation of the islands in 1833, an attitude declared by Quesada to be in "flagrant opposition" to the Monroe Doctrine.

Unfortunately for continued national progress, in the presidential election of 1886 Roca gave tacit support to his brother-in-law, Miguel Juárez Celman, a former governor of Córdova, who was pushed by the Córdova League, as the powerful group of politicians from the province was called. The candidate was elected in spite of the mutterings of the porteños, and proved to be weak, vain, and inefficient. The financial situation of the country was bad when he came into office, partly because heavy foreign loans had been made, and the country had for some time been flooded with paper money, which had been depreciating badly because of a two-year suspension of specie payments authorized by Roca in 1885. The new executive added to existing difficulties by further postponing the resumption of payments, by a new issue of paper money, and also by undertaking, in November, 1887, to guarantee by national bonds the notes of about twenty banks of the country. These and related follies brought the amount of government obligations to a staggering sum.

What was far worse than this business blundering was the fact that Juárez Celman permitted, and even participated in, a revelry of graft and corruption and a squandering of public money. Appointive offices were filled with "carpetbaggers" from Córdova, and soon the clique from the province dominated the whole government. Those of the politically faithful who failed to secure offices or aid from government funds through bribery or similar means were pleased with princely tracts from the public domain or with concessions for constructing railroads or other public works on dishonestly favorable terms. It was a most thoroughgoing and energetic application of the spoils system.

The political debauchery in Buenos Aires was reflected in the provinces, where the weakness of the president permitted some of the governors to revert to caudilloism and to assume extra-constitutional powers.

Public resentment mounted rapidly, and preparations were begun to turn the rascals out. Opposition crystallized into an organization called the Unión Cívica, which soon had branches throughout the country. The Juárez Celman administration tried by various high-handed measures to suppress the movement, but in vain. On July 26, 1890, armed revolt broke out under direction of the Unión, aided by the navy and part of the Buenos Aires garrison. Though the ammunition of the reformers gave out, Juárez Celman soon was made to realize the futility of trying to remain in control, and early in August he resigned his office to the vice president, Carlos Pellegrini. The event was marked by a burst of popular jubilation lasting for three days.

As heir to the disastrous régime of his predecessor, Pellegrini was in a far from enviable position. The treasury was empty, and the public debt was overwhelming. The new president had not the wisdom to cope with the situation, and the subservient Juárez Celman congress was a weak reed on which to lean. The fatal remedy resorted to was many more issues of inconvertible paper, bringing the currency down to new lows. This printing-press money could not be used for the payment of interest due on foreign debts; hence in January, 1891, the government failed to meet the obligation. There had also been wild private speculation, and in March came a run on the banks, causing the failure of many and a general panic. Industry and commerce received a hard blow. All looked to a new election for relief.

By this time the generation that had taken part in the struggle for independence had passed, and most of those who had helped to launch constitutional government after the overthrow of Rosas were also dead or retired. Ex-President Mitre was on the political horizon, however, and many turned to him to lead them out of the wilderness; but it soon became apparent that the Córdova politicians preferred civil war to a porteño as president. This fact led Mitre to withdraw in the interest of the general welfare, but with the understanding that a nonpartisan man be chosen who should receive the support of the provincials. The "conciliation" candidate was Luis Sáenz Peña, who had for many years been a judge of the supreme court and was held in high respect. The *acuerdo*, or agreement, reached by the two factions as a whole was opposed, however, by many members of the Unión Cívica, who, under the lead of Leandro Alem, formed the Unión Cívica Radical with Bernardo Irigoyen as candidate. When it became fairly certain that the supporters of Sáenz Peña aimed to manipulate the election returns if necessary to secure his victory, the Radicals plotted rebellion. But the acuerdo group frustrated this by imprisoning Alem and other opposition leaders until the election was over. Sáenz Peña assumed office in October, 1892.

Largely because of his very nonpartisanship the new president was unable to give strength and efficiency to the government. His unwillingness to "play politics" caused a practical deadlock in the machinery of government. Alem, elected to congress from the federal district, specialized in adding to executive difficulties. In 1893 revolts broke out in four of the provinces in favor of Alem as president. These were crushed by troops led by Roca, but Sáenz Peña, finding the situation intolerable, resigned, and in January, 1895, was succeeded by the vice president, José Evaristo Uriburu, who completed the term.

During most of the next twenty years the chief executives were men chosen somewhat in the spirit of compromise. This fact, which was a handicap to them in office, failed to make them acceptable to the Radicals, who continued to stir up trouble.

Various developments and events taking place during this politically rather colorless transition period are worthy of attention. Some of these were connected with the financial restoration of the government, which was much aided by the continued expansion of agriculture and industry and a corresponding growth in revenue from increased commerce. This enabled it after a few years to resume payments on the national debt. The railroad companies, which had been guaranteed fair incomes on their operations, were in a hard position when Uriburu came into office because the government had failed to make the payments called for; but they were tided over by money obtained through a large sale of bonds, and new contracts were made with them. Under Uriburu, also, the national government took over the foreign debts of the provinces, issuing bonds to meet the amount.

For several years the paper money continued to fluctuate badly; but in 1899, when Roca was again president, a bill was passed providing for the redemption of the paper in circulation at the rate of forty-four centavos gold for each paper peso of a hundred centavos and for the creation of a special specie conversion fund for the redemption.

Three different boundary disputes came up for final settlement during the period under consideration. The two with Chile, adjusted through arbitration by the American minister to Argentina and by the king of England, have already been considered (pp. 609–610). It was largely the fear of war over these questions that caused the political leaders to agree that a strong military man should be made president in 1898. This agreement resulted in the reëlection of Roca, who used his influence on the side of peace. The third difficulty over limits, remotely speaking, originated in the treaty of Tordesillas of 1494. It involved a portion of the Misiones territory lying between the Iguassú and Uruguay rivers which Brazil claimed as well as Argentina. With this had been concerned the unratified treaty of exchanges of 1750. The more recent trouble had come over the identification of a pair of tributaries of these streams mentioned in eighteenth-century negotiations between Spain and Portugal. In 1857 the Urquiza administration had signed a treaty with Brazil agreeing that the boundary should be the westernmost of two tributaries of the two main rivers, one branch flowing north and the other south from sources which were not far apart. The congress of Argentina would not accept this decision, and demanded that the line be run along two other tributaries about fifty miles to the east. Brazil in turn refused to accept this, and the matter was still open in 1890. In that year an attempt was made by the two governments to divide the disputed territory, but it met with much disfavor from the Brazilian people; therefore in 1891 it was agreed to submit to the president of the United States the question which of the two sets of tributaries was the just boundary line. In February, 1895, Grover Cleveland rendered a decision in favor of the line formed by the Pepiry and San Antonio tributaries, which was that claimed by Brazil. The chief determining factor was the existence of a considerable Brazilian population in the disputed region, whereas there were practically no Argentine settlers. Argentina accepted the disappointing award gracefully, and President Uriburu sent to the Brazilian executive a message expressing pleasure over the friendly settlement of the long-standing dispute.

In the period that followed the election of Luis Sáenz Peña the Radicals remained out of office and away from the polls on the ground that with the existing open ballot voting was futile, since elections were not free. It was a prolonged political strike. Agitation was kept up and became more vigorous as time passed. In 1905 a Radical uprising took place. By 1910 the question of election reform had become a serious and insistent one, and in that year Roque Sáenz Peña, son of the "conciliation" president, was elected chief executive on a platform promising election reform. Accordingly a law was passed and went into effect in February, 1912, providing for secret, compulsory voting, with punishment by fine for unexcused absence from the polls.

This brought about, by the presidential election of 1916, a revolution which had something of the significance of the victory of Andrew Jackson in 1828, which was made possible by the granting of manhood suffrage. A large number of votes were cast, the Radicals won, and have been in office ever since. Their candidate was Hipólito Irigoyen, a well-educated rancher of humble family of Basque extraction. Irigoyen had been associated with Alem in early Radical movements and had filled minor political offices. Like Jackson, he was the first "man of the people" to be elected president of his country; like "Old Hickory" also, he was defiantly independent and had limitless courage, physical and moral. After he had taken the oath of office the street crowds celebrated the coming of the new era by unharnessing the horses from his carriage and, amidst noisy rejoicing, themselves pulling the vehicle to the presidential palace.

During his first term the Radical president showed in two conspicuous ways his disregard for public opinion and even of the wishes of his supporters. Despite strong pressure from the outside and much popular clamor at home, he kept Argentina neutral during the World War; for he felt that this status was more conducive to national welfare and that it was necessary to the carrying out of the social reform program pledged before election. Though the avowed friend of labor, yet during the serious strike of stevedores in Buenos Aires after the postwar industrial slump he called out the troops, who mowed down the strikers by the hundreds, causing horror and dismay in many quarters. Irigoyen also intervened in the provinces to an unusual degree to uphold the local and national constitutions. On the other hand, he encouraged the passage of various measures favorable to labor, including a minimum-wage law intended to prevent the distress threatened by the currency deflation after the World War.

The administration of Marcelo T. de Alvear, who was elected to the presidency in 1922, was very troubled, partly because of the tactics of the opposition in congress, which created a deadlock of long duration. In 1923, before the deadlock, the workmen's pension act was passed, which called for a payment from laborers of 5 per cent of their wages to a government pension fund. A like amount was to be contributed by employers. The measure was unpopular from the first, and the attempt to put it into effect in 1924 met with a serious industrial strike. In the following year the law was suspended, and in 1926 it was repealed.

The Alvear government likewise had trouble with the Church over appointments,[1] resulting in the severance of diplomatic relations with the papacy. Part of the friction was caused by the fact that the bishop of Santa Fé was not recognized by the government because he failed to present to it his papal credentials. When he did so in December, 1924, the incident was ended. Meanwhile, however, the Pope had withheld ratification of the appointment to the archbishopric of Buenos Aires made by the government in 1923, and the government refused for some time to make another choice. Not until 1926 was an adjustment made between the papacy and the Alvear administration. While the quarrel continued the Socialist element agitated strongly for the disestablishment of the Church.

During the term of Alvear relations with the United States became somewhat strained owing chiefly to the Fordney-McCumber tariff act passed by the American Congress in 1922. This measure, which was highly protective, tended to shut out from markets of the United States various major Argentine exports, especially food products. In January, 1928, Honorio

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[1] The nominations were commonly made by the government and ratified by the Pope.

Pueyrredón, the Argentine ambassador to the United States, resigned his office while the sixth Pan-American conference was in session at Havana because the American delegation opposed the consideration of tariff reform at the gathering.

In 1928 Irigoyen, who was now seventy-six years old, was again Radical candidate for the presidency, and won two hundred and sixty-nine electoral votes against one hundred and thirty-eight for his opponent. The election showed that Radical strength had increased at the expense of the Socialist party. Stimulated, perhaps, by the evidence of national support and confidence shown by his large vote, Irigoyen began his second term more autocratically than he did his first one. He failed to pay various government obligations, domestic and foreign, on the ground that the contracts involved—made by the Alvear government—showed irregularities; he intervened in four of the states in a manner held by many to be unjustified and unconstitutional; he treated various department heads in a high-handed manner; and late in 1929 he further roused the ire of the opposition by upholding his supporters in congress in opposing the seating of two anti-Irigoyen senators from San Juan and Mendoza, states where political irregularities had led to presidential intervention.

Meanwhile there were dock-workers' strikes in most of the important harbors of the country, which tended to increase the normally high cost of living. By the latter part of 1929 the president had lost most of the popularity which had won him the election.

The development of Argentina, especially along material lines, has been very great during the past half-century. In consequence, to some it has become the "amazing Argentine." But the progress has been the natural result of the peace and political stability on which the favorable climate and fertile soil had long been waiting. After 1880 the value of ranching and tillage products increased many fold. In 1878 there were about twelve million cattle in the country, practically all of the half-wild, longhorn, "creole" type, raised chiefly for their hides and their flesh, which was jerked for the Cuban and Brazilian markets. The throwing open in 1881 of southern lands recently cleared of Indians greatly stimulated cattle-raising and helped to change its methods. Blooded stock were brought in to improve the local breeds, and ranchers began to plant alfalfa on a large scale for cattle feed, to take the place of wild grasses. By 1899 the cattle of the country had not only doubled in number but had much improved in type; by 1922 they had increased to thirty-seven million head, and fine breeds for all uses were being produced. Dairying, begun about 1890, made considerable growth. About the same time the first establishments for canning and freezing meat were set up in the country. With these changes, others were inevitable. The free plain began to be crisscrossed by barbed-wire fences, to the indignation of the gauchos, who were accustomed to graze their herds where the grazing was good, with little regard to land titles.

Sheep-raising fared rather differently from the cattle industry. In 1878 there were about sixty-five million sheep in Argentina, raised primarily for their wool. By 1899 there were eighty-nine million, and Patagonia had become the great sheep range of the country. After this there was a decline, the total number of head in 1922 being only a little more than thirty-six million; but in consequence of the improvement in breed the amount of wool from each animal had almost doubled. Frozen mutton had become an important export.

A corresponding growth took place in tillage products. In 1878 Argentina did not produce enough wheat for its own use, and hardly enough maize; but soon there came a vast expansion in the acreage of these two crops, and flax-growing for the sake of the seed also became an important agricultural industry. In 1899 the country exported more than fifty million bushels of wheat and forty million of maize. Two years later the government reported fifteen hundred thousand acres planted to flax. Other crops, such as oats, barley, rice, and alfalfa hay, also became of increasing value. Most of the cereals and the flax were grown in the north-central provinces, especially in Buenos Aires, Santa Fé, Córdova, and Entre Ríos. Farther north, in Tucumán, Salta, and Jujuy, the production of cotton and sugar cane began to develop. Grape-growing for wine, an old industry in the semiarid foothill provinces of the southwest, notably in Mendoza, San Juan, and Catamarca, continued of importance.

Despite the marked expansion of interest in tillage crops, not more than a fourth of the vast cultivable plain of Argentine has yet been broken by plowshare, and the country is still primarily pastoral in its rural economic activities.

Under government stimulus the manufacture of textiles and clothing is growing, but most of the manufacturing industries are of the simpler sort connected with food products, such as the preservation of meat, flour-milling, and the making of sugar and molasses.

The country's export trade kept pace with its internal economic expansion, the most important products sent out being cattle, preserved meats, hides, wool, leather, tallow, butter and cheese, wheat, maize, oats, barley, flaxseed, and baled alfalfa hay.

Just as the earlier economic development of the country was fostered by the building of the first important railroad lines, so the continued expansion of modern transportation was essential to continued economic development. The great increase in railways during Roca's first term has been mentioned. Under his successors the laying of new tracks proceeded for the purpose of uniting old lines and making them more efficient as well as of building new ones to isolated parts of the country. Railroad connections built in this later period included lines completing communication between Buenos Aires and La Paz, already referred to, also the Transandine road, uniting the capitals of Argentina and Chile, which was opened in 1909. The greatest amount of railroad-building, however, has been done in the south, where half a century ago wild Indians roamed. Here many thousands of miles of line have been laid down, converging at Bahía Blanca, where a large modern port has recently been made. The first of the roads in the region to attain marked importance was the Buenos Aires Great Southern, which by 1910 had nearly three thousand miles of track and owned sufficient wharf and loading facilities at Bahía Blanca for fourteen ocean-going vessels. Lines under construction westward from the Río Negro are pushing the frontier line of Argentina still farther toward the south, and are intended in time to cross the Andes and connect with Chilean roads.

The railroad lines, which in 1925 totaled more than 25,000 miles, were at the time largely owned by foreign capitalists, chiefly British, though there were some French interests. About 20 per cent of them were state-owned, and the proportion had been increasing since the World War, when the dearth of foreign capital caused the adoption of a state-building policy.

One especially pleasing result of the economic expansion and the increase in national wealth coming to Argentina during recent decades was the modernization and beautification of its cities, especially Buenos Aires. Work on the capital was begun during the administration of the graceless and inefficient President Juárez Celman, to the accompaniment of much stealing of public funds; but there were also substantial results in the form of handsome public buildings, wider streets, and new parks, and in the beginning of the magnificent wharves of Buenos Aires, which were completed in 1900. Under other presidents the work of making the capital more comfortable and attractive was continued, and other cities took inspiration and followed suit.

The gain in population of Argentina kept pace with its economic growth and, indeed, contributed greatly toward this growth, for much of the increase came from immigrant labor. The census of 1924 gave the country 9,293,797 inhabitants, as against 3,954,911 in 1895 and 7,885,237 in 1914. In December, 1926, the estimated population was 10,300,000. The most recent count showed the population of Buenos Aires to be 1,811,745. By 1928 almost a third of the inhabitants were foreign-born, making Argentina even more a country of immigrants and a nation in evolution than the United States of America. In the southern territories—Santa Cruz, Neuquén, and Tierra del Fuego, which have recently been opened to settlement—is found the largest fraction of aliens. The most numerous foreign element are the Italians, of whom about 2,295,000 arrived in the sixty years from 1857 to 1917; the next in importance are the Spaniards, with about 1,500,000 representatives in 1917. Most other European countries made some contribution to the ethnic mixture, as did also Syria. Among the minor nationalities are about 55,000 British, who have been important out of proportion to their numbers, because many of them became holders of large estancias and were very influential in introducing modern methods in stock-raising and agriculture.

The population is almost wholly white, though there is a strain of aboriginal blood, especially in the north. Though labor is quite free, Argentina is a rich man's country, with millions of poor and humble, a few thousands possessing very great wealth, and only a very small—though growing—element having intelligence and fair competence to form a middle class and supply a national balance wheel. For these extremes the land system, or lack of system, has been largely to blame. The fertile soil was permitted to pass into the hands of a few through governmental favoritism, the dishonesty of some of the colonizing agents, and the policy—followed until recently—of selling lands in such large minimum tracts that people of little capital could not afford to buy, even though the acreage price was very low. By these means there developed vast individual holdings, making possible the acquisition of great fortunes by the owners through increase in values coming merely from the general economic development of the country and not from any effort on the part of the holder of the land. This situation contributed to the growth of radicalism in Argentina and to serious friction between capital and labor.

Despite the marked growth in prosperity during the last quarter of the nineteenth century, little was done for education in Argentina to follow up or even maintain the work begun by Sarmiento while he was president. The educational system launched by the "schoolmaster president" largely went on the momentum which he gave it until after the new century had begun. In 1900 the illiterates numbered more than 50 per cent of the population above six years of age, and large stretches of country lacked elementary schools; but during the next decade steps were taken to better conditions through the founding of rural normal schools and through a decided increase in facilities for teaching the primary branches. The census of 1914 reported the illiterates of more than seven years of age to be about 35 per cent of the total population, which evidently showed marked headway in education since 1900. After 1916, when the Radicals won in various provincial elections as well as capturing the presidential office, greater efforts were made to reduce illiteracy, and in Irigoyen's first term more than a thousand elementary schools were established. Many of them were started through initiative from Buenos Aires; for elementary education was under national as well as local control, whereas secondary training was entirely in charge of the central authorities. Though the colegios, or secondary schools, were considerably increased in numbers after the beginning of the new century, they have been quite inadequate to the needs, though reserved almost exclusively for the boys. Girls who have wished to secure training beyond the elementary grades have been expected to attend the normal schools, whether or not they desired to train for teaching; for these greatly outnumbered the colegios owing to the general neglect of school reorganization after the days of Sarmiento. Higher and technical education are supplied by special schools of agriculture and engineering and by the universities of Córdova, Buenos Aires, La Plata, Tucumán, and the Littoral, which has its headquarters at Santa Fé. Schools of art and conservatories of music have also been established during the last few decades, and likewise public libraries in some of the largest cities. In Buenos Aires are a number of important museums rich in collections throwing light upon the country's social and political past, and at La Plata is the National Museum, devoted to natural history and containing the best collections to be found in Latin America.

XXX

BRAZIL: EMPIRE AND REPUBLIC

The Reign of Pedro I

WHEN Brazil launched as an independent nation, its ruler, the Emperor Pedro I, was barely twenty-four years of age. He was inadequately educated, but showed some desire to make up the lack by studying languages. He was unusually skilled in mechanics and in music and, being of pious bent, had composed most of the sacred selections used in his father's chapel. He was also energetic, impulsive, and at times indecisive, pleasure-loving and fond of popularity, yet lacking in tact and often in dignity. His wife, whom he had married in 1817, was the Archduchess Leopoldina of Austria, daughter of Emperor Francis I and sister of Maria Louisa, wife of Napoleon Bonaparte. The empress was well educated, unaffectedly friendly, and very popular, partly because she distributed alms with lavish hand, which irritated the more thrifty Pedro.

In view of the fears of the Brazilians for their security and of their desire for guaranties of independence, the constitutional convention which Pedro had promised was called promptly, and was formally opened on May 3, 1823. The members, though inexperienced politically, were intelligent, outstanding individuals, and included forty-eight lawyers, nineteen clergymen, and a few each of military officers, merchants, and men of affairs. José Caetano, the learned bishop of Rio de Janeiro, was elected president of the gathering. Among the most talented of the delegates were the three Andrada brothers, two of whom, José Bonifacio and Carlos Antonio, were members of the imperial ministry and were also on the committee appointed to draft a constitution.

In his address upon opening the assembly the emperor referred to his coronation oath to defend "the constitution, if this last were worthy of Brazil and of me," and warned against a basic law abstract and metaphysical rather than one suited to the needs of the country. These words were resented by some of the members as an attempt at dictation, but they were defended by the two Andradas, José Bonifacio pointing out the turbulent Spanish-American states as examples of the dangers of democracy for countries not prepared to apply its principles. The Andradas and some others also stood out for a strong government with considerable imperial authority; while opposed to them were delegates who spoke fervently for liberalism and a larger degree of popular control.

As the debates proceeded they showed clearly a suspicion of the emperor's aims and hostility toward the Portuguese in the country. In June, 1823, a member of the convention introduced a resolution for the expulsion of all Portuguese who might be thought unfriendly to the empire. Carlos Antonio de Andrada spoke in favor of the measure, which the Portuguese royalist element in the convention believed was directed at them. Therefore, with the aid of the democratic members, they induced Pedro to expel the Andradas from his cabinet.

As a result the Andradas worked in the constituent assembly in the interest of liberalism and against imperial authority. A newspaper which they established in the capital and named *Tamoyo*, for a tribe of Indians noted for hostility to the Portuguese, was very outspoken. Through such influences the spirit of democracy grew, and, says a contemporary writer, "every apothecary's and barber's shop, the usual places for discussing political questions in Rio, became a debating club." The project of a constitution which was completed late in August, 1823, reflected the liberal principles thus disseminated. Soon afterwards a letter severely criticizing the Portuguese artillery officers appeared in the *Sentinella*, one of the liberal papers. In response two of the officers assaulted an apothecary supposed to be the author. The incident provoked violent speeches in the constituent convention: Carlos Antonio de Andrada proposed that the offending Portuguese be at once banished from the empire, and Martím Francisco, the most violent of the Andrada brothers, denounced all Portuguese within the land as "infamous monsters." At the same time the *Tamoyo* warned Pedro to recall the fate of Charles I of England.

The emperor, who sympathized with the military and had followed with growing concern the drift of sentiment in the constituent convention, now planned to expel the Andradas from it or to dissolve the whole gathering; but the opposition of his ministry to either measure caused him to dismiss that body and select another. On November 12, 1823, he surrounded the convention hall with soldiers and forcibly dispersed the delegates. The three Andrada brothers were exiled to France.

The aim of Pedro in dissolving the gathering was doubtless to save the country from anarchy. He considered himself a liberal, however, and intended to give Brazil a constitution as promised; therefore he promptly appointed a commission of ten which, under his direction, drew up a basic law. After it had been indorsed by a sort of municipal plebiscite, the emperor, on March 25, 1824, took oath to support and defend it.

This constitution, under which Brazil was ruled for sixty-five years, declared the country's government to be monarchical, constitutional, and representative. Legislative power was to be vested in a general assembly of two houses—the lower to be made up of deputies elected for four years, and the upper to be composed of senators nominated for life by the emperor from a list drawn up by a body of electors. The executive power was to be vested in the "constitutional emperor and perpetual defender of Brazil," who was expected to rule through ministers and a council of state named by himself. To the emperor was given the power to convoke the general assembly and exercise a suspensory veto over its acts, and to dissolve the chamber of deputies. After three successive sessions of the assembly had approved a measure and presented it to the emperor for his sanction, it should go into effect even if he had not signed it. The judicial power was to be independent of the other branches of government and was to be vested in judges of various ranks.

So far the constitution was in fair conformity with the needs and traditions of the nation; but this was not true of the provisions for local government. The geographic diversity of the country and its colonial system called for a considerable degree of federalism; for the spirit of local independence developed in the early captaincies had never been lost. Nevertheless the constitutional commission, dominated by Pedro, who feared local power, had made the government of Brazil unitary rather than federalist. Though provincial and municipal councils were authorized, to be chosen by direct election, they were little more than debating bodies, for they had no actual power. The real control over the provinces, or captaincies, and indirectly over the municipalities, was in the hands of presidents who were to be appointed by the emperor and removed by him.

The constitution recognized the Roman Catholic as the state religion, but stipulated that no one should suffer persecution for his faith so long as he respected the established church and did not through his religion offend public morals.[1]

The constitution also contained numerous individual guaranties, including equality before the law, taxation according to wealth, and freedom of speech and of the press. But provision was made for punishment of those abusing this freedom.

The constitution being adopted, the emperor was anxious to have Brazil's independence fully acknowledged. The United States had been the first to recognize the new nation, and other governments had followed; but relations with Portugal were still unsatisfactory. However, after long delay and much negotiation, a treaty was completed with the mother country in 1825 whereby Brazil was acknowledged as an independent sovereignty, but with the stipulation that it assume $10,000,000 of the Portuguese debt. When this provision became known, there was some resentment in Brazil, since part of the debt was incurred by Portugal in fighting her colony during the brief war for independence; but it was a decided relief to the nation as a whole to have the danger of reconquest removed.

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[1] This display of tolerance was the result partly of open-mindedness among educated Brazilians and partly of British influence. In a treaty made between England and Portugal in 1810, two years after the former had aided the Portuguese royal family to escape to Brazil, was a stipulation giving the English a right to build a Protestant church in Brazil, provided that it was made to look like a private house and did not use bells to assemble the worshipers. One of the strongest advocates of this concession was the bishop of Rio de Janeiro, José Caetano, whom R. Walsh, chaplain of the British embassy in Brazil, described as "not only a tolerant and liberal man, but a man of excellent good sense and knowledge of the world" (R. Walsh, *Notices of Brazil, in 1828 and 1829*, Vol. I, pp. 322–323).

While these negotiations were going on the Brazilian empire was seriously threatened with disintegration. The trouble was largely centered in Pernambuco, where the spirit of local autonomy had been strong since the driving out of the Dutch, and had been aggravated by the revolt of 1817. The emperor had sent up his own appointee as president of the province, but by the time more serious trouble began three different local assemblies had refused to recognize any president except one of their own choice. The incumbent of the office was at the time Manoel de Carvalho, a participant in the revolt of 1817 who had been elected by the provincials. Even before the Pernambucans learned of the unitary character of the imperial constitution, they had been much stirred by Pedro's dismissal of the constituent assembly; and knowledge of the actual character of the constitution proved the last straw. Under the leadership of Carvalho a proclamation was issued in July, 1824, denouncing the emperor as a traitor who intended to give control of the country to the Portuguese and calling upon all the northern provinces to throw off his authority and unite to form a republican "Confederation of the Equator."

Unfortunately for the revolutionaries their neighbors did not feel as enthusiastic over the plan as they themselves; but uprisings took place in parts of Parahyba, Rio Grande do Norte, and Ceará, and considerable republican sentiment existed in Maranhão, which was at the time in a state of anarchy. Lord Cochrane again went to the aid of Pedro, and by the close of the year had crushed the revolt in the north and also restored order in Maranhão. Some of the leaders of the uprising were executed, but Carvalho escaped aboard a British vessel.

Scarcely had peace been established in the Pernambuco region when, in April, 1825, began the revolt in the Cisplatine province which resulted in an independent Uruguay. This outcome contributed much toward Pedro's unpopularity; for the expansionist spirit of the Brazilians remained strong, and they had sacrificed much in the bloody war with Argentina over the province.

Before the end of the struggle other factors had roused feeling against the emperor. Many of the aristocracy were irritated by his lack of dignity and reserve, which caused him to resort to familiarity with his subjects and to tolerate it even from the street crowds, resulting in loss of the respect commonly accorded to royalty for its own sake. Some members of the higher classes were dissatisfied by the fact that in creating peers and conferring other distinctions Pedro was swayed more by favoritism than by individual merit.

More generally resented was his scandalous attachment for the marchioness of Santos, for whom he built a house next to the palace. Cabinet meetings were held at the home of this "Madame Pompadour," as she was called, and the marchioness played an important part in the appointment and dismissal of ministers. Even very free-and-easy Brazilians held that the emperor should be an example to his subjects, and feeling against him was the stronger because of the popularity of the kindly Empress Leopoldina. When the empress, who had been in poor health, died in December, 1826, shortly after a violent quarrel with Pedro over the marchioness, many people in high circles considered him responsible for the tragedy.

Most serious of all in estranging the emperor from his subjects was the old jealousy and fear of Portuguese influence, which was brought to a very critical stage by the death of King João VI on March 10, 1826. The Brazilians now became alarmed lest Pedro, who was his father's heir, return to Portugal and subordinate Brazil to that kingdom. Pedro doubtless would have preferred to retain both crowns, but did not dare, in view of the Brazilian attitude; hence, after granting a constitution to Portugal, he abdicated its throne on May 2, 1826, in favor of Princess María da Gloria, his eldest child, who was seven. It was understood, however, that the princess was to marry her uncle Miguel, Pedro's brother, a type of arrangement by no means unprecedented in Spanish and Portuguese royal circles. The betrothal ceremony was performed by proxy soon after João's death; but before the marriage could take place Portugal was in a turmoil, and the weak regent appointed by João was helpless to restore order. Hence Pedro decided not to wait until the completion of the marriage before making Miguel joint ruler with María da Gloria, but to give him royal authority in Portugal at once. This was done by decree in July, 1827, and promptly afterwards Miguel assumed control, set aside the constitution, and proceeded to rule despotically. The next year he called an assembly which on June 23, 1828, declared him the only legal ruler of Portugal, and a few days later he assumed the title "king of Portugal and Algarve." When word reached Brazil of the bold setting aside of María da Gloria as ruler of Portugal, great was the excitement and indignation in royal circles. Pedro, with some aid from María's Austrian grandfather, upheld his daughter's claims as best he could; but for some time Miguel retained the advantage. The emperor's efforts in behalf of María da Gloria were unpopular among the Brazilians because of the expenses incurred by the war.

It was the thrusting of the "Portuguese question" into the governmental operations of Brazil that was really the basic cause of Pedro's downfall. Quarrels over it came up between the emperor and the assembly, which began to meet regularly after the need for funds for the war with Argentina forced Pedro to call it. Since the deputies almost immediately demanded a parliamentary system on the British model, friction quickly developed over the personnel of the cabinet, and deadlocks were very frequent, for Pedro tended to favor ministers from the "Portuguese party" because he was more certain of their loyalty. While the emperor retained in his cabinet men to whom they objected the deputies repeatedly refused to vote the budget, and even ignored imperial recommendations for reforms of importance. Thus little was accomplished by the assembly, and the country drifted.

The press did much toward crystallizing and stimulating feeling against the emperor, especially after 1826, for from then on

Pedro did not dare attempt to restrain the newspapers, which were very numerous. Some of the papers, like the *Aurora Fluminense*, started by Evaristo da Veiga in 1827, were moderate, and called attention to actual faults of Pedro; others were mere organs of attack, and resorted to exaggeration and made baseless charges. The emperor's preference for natives of Portugal was made the most of by the critical press in general and his alleged extravagance was emphasized by some papers, such as the *Republica*, which habitually made ironical reference to "our *very dear* Emperor." The charges and insinuations were read in the provinces and taken largely at their face value.

The news of the French revolution of 1830, which was given much space by the opposition press, further increased resentment against Pedro and also restlessness in the country as a whole. Because of threatened uprisings certain sections were placed under martial law. In January and February, 1831, Pedro with his family made a visit into Minas Gerães in the hope of regaining his lost popularity, but his reception was so cold that he began to think seriously of abdicating in favor of his son.

When he returned to the capital the Portuguese and some others celebrated the event by illuminating their houses and building bonfires, but his opponents, especially the Federalists and Republicans, refused to do so. On the night of March 13 Brazilian liberals put out some of the bonfires of the Portuguese, who retaliated by an attack on the Brazilians, resulting in the wounding of several. After that the Portuguese paraded the streets calling out *vivas* for the emperor and death to those who had failed to illuminate in his honor.

This affair made reconciliation between the two factions impossible, for the Brazilians had come to look upon the Portuguese as a group as insolent, interloping foreigners who must be put down. Revolutionary plans had begun to simmer; but it was decided first to give Pedro a chance to right himself in the eyes of his opponents. The assembly was not in session at the time; but a number of deputies were in the capital, and at their request Evaristo da Veiga, editor of the *Aurora*, drew up an address to Pedro pointing out Brazilian grievances and demanding that the offending Portuguese be punished and that the emperor cease from surrounding himself by traitors.

Pedro responded by making several changes in his ministry, putting in some mediocre Brazilian senators; but on the morning of April 6 he dismissed this cabinet and appointed a new one from his unpopular titled aristocracy. Late on the sixth a committee called upon him at his palace and asked that the dismissed ministers, "who had the confidence of the people," be reinstated. Pedro refused to comply, saying, "I will do everything for the people, but nothing by the people." He was, he declared, acting in accordance with the constitution, which was true as regards the matter in dispute. When he learned, in the early hours of April 7, 1831, that his army had deserted him, he wrote out his abdication in favor of his son, Pedro de Alcántara. As guardian of his four youngest children and tutor of his heir he appointed José Bonifacio de Andrada, who with his two brothers had returned to Brazil in 1828 and been restored to royal favor. Shortly afterwards Pedro left for Portugal with his daughter María da Gloria, for whose rights to the Portuguese throne he struggled during the next three years, winning them shortly before his death in September, 1834.

Though the ten years of Pedro I's reign were much troubled, definite progress was made in various directions during the period. Under the constitution of 1824 the Brazilians enjoyed a degree of personal liberty scarcely found in Spanish America, partly because Pedro was afraid to resort to restrictions on individual freedom lest he increase the feeling against him. Religious tolerance became firmly established, with the approval of many of the clergy, who had become much secularized in thought by the French revolutionary philosophy. The general assembly of the nation, though showing lack of efficiency, had been given valuable experience, which helped to develop leaders for the later period. Before the war with Argentina began, a definite effort had been made to foster agriculture (especially coffee-growing), mining, and commerce. The government had also sought to stimulate immigration; but this was badly planned, and the only result was the settlement of a small colony of Irish near Bahia. Finally, education, which had been given a new impulse by King João, continued to be a matter of public attention under Pedro. R. Walsh, chaplain of the British embassy, wrote in the midst of the war with Argentina that "every Brazilian town had primary schools" and "generally one professor of Latin at least." Public libraries were being founded here and there, and every large center had at least one newspaper.

THE REGENCY

Before Pedro I's abdication the revolutionary plotters had not been agreed as to whether the new government which they wished to set up should be a republic or a monarchy; but after the emperor named his son—who was acceptable because born a Brazilian—as his successor, a monarchical government was decided upon. As the child was not yet six years of age, a regency was set up for him. The period of the regency, as Joaquim Nabuco later pointed out, was really a republican experiment. It was also the most turbulent and critical time of Brazil's history. The nation seemed bent upon tearing itself into fragments. In practically every province there was disturbance of some kind, usually resulting from the efforts of the Brazilians to drive out the Portuguese or from the utter demoralization of the troops. In some parts the spirit of federalism developed into secessionism, especially in Bahia and Rio Grande do Sul, and the provinces fought for independence from the empire. In Rio Grande the conflict was especially long and bitter, lasting from 1835 to 1845.

Within the central government itself discord continued, and factional strife was chronic in the house of deputies. Here there were at first three fairly well-defined groups: the *Exaltados*, or extreme Liberals, who desired a federal republic; the *Moderados*, led for a time by Evaristo da Veiga, standing for a constitutional monarchy; and the *Restauradores*, who wished the return of Pedro I, at least to serve as regent for his son. After the death of the ex-emperor his supporters aligned themselves with the Moderates, who came to be called Conservatives; their opponents were known as Liberals. The parliamentary principle was maintained, and an effort was made to keep the ministry in harmony with the majority party of the house of deputies, but the system worked painfully and discordantly.

In June, 1831, the temporary committee of regency gave way to a regular one made up of three members, but throughout its term of four years the anarchic conditions continued. Some of the local disturbances were eliminated by the efforts of Diogo Antonio Feijó, a Liberal priest, who, as minister of justice, brought about the punishment of the seditious element in the regular army. In connection with this reform there was created a national guard which the government used against the undisciplined regular troops. The conduct of the latter during this critical period did much toward disgusting the nation with the army and preventing intrenchment of militarism in Brazilian politics. The triumvirate regency, because of pressure by the Exaltados, in 1834 secured the adoption of an amendment to the constitution, known as the *Acto Addicional*, which brought about some desirable changes. The most promising provision of the Acto conceded to the provinces much greater powers through replacing the futile councils by elected legislatures having extensive authority, which in only a few cases could be limited by veto of the president. But the president was still to be an agent of the central government. The amendment likewise did away with the rather useless council of state, and provided that there should be but one regent.

The man selected in 1835 for this difficult position was the energetic Padre Feijó. By the time he assumed control some of the early major disturbances in the north had been put down, and in other parts the compromise granting provincial legislative assemblies made for reconciliation; but much of the regent's attention was taken up with the war in Rio Grande do Sul (see page 695), which broke out a month before his accession. His efforts to restore peace to the south were in vain, and this fact led to his forced resignation in 1837. His successor was Pedro de Araujo Lima, later made marquis of Olinda, who had helped to form the new Conservative party which won at the polls in 1836. Unfortunately a secessionist war in Bahia divided the energies of the nation for a year and made the pacification of the south more difficult. The continuation of disorders led to criticism of the regency; but more generally resented was the fact that it practically robbed the provincial legislatures of all autonomy through taking away sources of revenue before granted to the provinces. Thus subservience to the national authorities was the price necessary to secure funds for local needs.

The continued unsatisfactory state of affairs led the Liberal opposition to press for the establishment of monarchical control. Some desired that the Princess Januaria, who was five years older than her brother, the emperor, become regent; but she was unwilling to undertake the appalling task. This led to a movement headed by Carlos Antonio Andrada, now a member of the house of deputies, to have the heir declared of age and give him the reins of government. After a long struggle the regency was forced to yield; and on July 22, 1840, young Pedro of Alcántara was requested by a joint committee of the political elements to rescue the country from anarchy by consenting to assume control. The boy of fifteen replied, "Quero já" (I wish to do so at once). The next day the national assembly solemnly proclaimed the majority of Dom Pedro II, emperor of Brazil, and a few hours later the new ruler took oath to uphold the constitution of the land. It was not until a year later that the coronation ceremony took place, but with Pedro II's oath of office the turbulent period of the regency ended.

THE REIGN OF PEDRO II

Though he encountered many problems, the second Pedro had a less difficult task than his father. The new emperor was a Brazilian, and there was no "Portuguese question" to haunt and harass the nation; since the Liberal party, which had given so much trouble to Pedro I, was responsible for the early accession to power of his son, there was more chance of support from its members, many of whom had lost their enthusiasm for republicanism through the provincial turmoil characterizing the regency; and, finally, the nine years of attempt at parliamentary rule during the young emperor's minority had given valuable political experience to many who rendered strong service to the new ruler.

Pedro II was likewise better prepared for his task by training, disposition, and character than his father. His formal education had been broad and sound, and he developed a fondness for intellectual pursuits which made him a lifelong student, noted for his breadth of information; he probably loved his books better than he did his scepter. Pedro II was six feet three or four inches tall and commanding in appearance. In sharp contrast to his father, he was dignified and reserved in manner and made no cheap bids for popularity; he was simple and refined in his tastes, democratic in manners and dress, kind, honest, and anxious to rule with wisdom and justice. He soon came to love his subjects and to be loved and respected by them. When he was eighteen years of age he was married to the Princess Theresina Christina, daughter of King Francis I of the Two Sicilies. During the forty-nine years of his reign his private life gave no cause for scandal.

Though Pedro II swore to rule constitutionally, and did so in outward form, he really manipulated the machinery of government to a semidespotic degree; for he felt that, in view of the political ignorance of the nation, no other method could secure harmony and result in the greatest good to the greatest number; but he tried to keep in touch with public opinion and, if possible, to rule in accordance with it. Though he consulted the council of state—which was restored—and left much to his ministry, he was always the final authority. For practically the whole of his long reign he was the dominant figure in Brazilian politics.

The first task confronting the government of Pedro II was the pacification of the country, for revolts broke out in São Paulo and Minas Gerães soon after the accession of the new sovereign, and desultory civil war continued in Rio Grande do Sul. Order was soon restored in the northern provinces; but the sturdy gauchos of Rio Grande—which had been playing at independence for several years—could not be induced until 1845 to lay down arms and accept imperial rule. However, reconciliation to the new order of things was hastened by the granting of full amnesty to the insurgents of all the refractory provinces.

In 1847 and 1848, partly as an echo of the European revolutions of the period, disturbances took place in Pernambuco, marked by the killing of many unattached Portuguese in the province. After order was restored there the empire of Brazil enjoyed forty years of almost complete internal peace marked by progress and the enjoyment of greater liberty among the free than was to be found elsewhere in the Western Hemisphere outside the United States of America.

In these four decades, however, the country was distracted by two foreign wars already mentioned: the brief one against the dictator Rosas of Argentina in 1851 and 1852 and the prolonged struggle of the triple alliance against Francisco López of Paraguay from 1864 to 1870. The aim of the Brazilian government in its interest in the small countries to the south was doubtless to secure political and military supremacy over them; and the meddling activities resorted to were unjustified by the situations which gave rise to them. It will be remembered that in 1851 Brazil took advantage of Uruguay's helplessness to secure the cession by treaty of a large tract of land between the Ibicui and Cuareim rivers. From an opportunist standpoint, fishing in the troubled waters of the Oriental Republic paid Brazil. The war with Paraguay, however, cost the empire five years of time, about $300,000,000 in money, and fifty thousand lives. For these losses the territorial gains from the defeated enemy seemed very small return. This experience gave the Brazilian nation a strong inclination to settle international difficulties by negotiation and arbitration rather than by the sword, and to devote itself more definitely to internal development.

At about the same time the imperial government changed its attitude as to another matter. This was the navigation of the

Amazon River, from which Brazil had at first tried to exclude all nations except those owning territory upon its banks. But the more liberal attitude adopted by neighboring nations regarding the use of their rivers caused foreign pressure to be brought to bear upon authorities at Rio de Janeiro; consequently in December, 1866, the Brazilian government announced a change of policy; and on September 7, 1867, it threw open to the merchant vessels of the world all portions of the Amazon River system lying within the frontiers of the empire.

With the winning of domestic peace began material prosperity for Brazil through the extraction of natural products and the expansion of agriculture, industry, and commerce. During the latter half of the nineteenth century profits from rubber were added to the income from cabinetwoods, dyewoods, and medicinal plants. In the late eighteen-seventies rubber-gathering began, partly owing to droughts in Ceará from 1877 to 1879, which drove many inhabitants of that province into the Amazon jungles in search of a living. Cattle-raising remained the dominant economic activity in various sections, especially in Rio Grande do Sul and the rougher portions of Rio Grande do Norte, São Paulo, Minas, and Rio de Janeiro. The production of sugar cane and cotton was of great importance in the north, as it had been during the colonial era. In the reign of Pedro II, however, the south began to threaten agricultural rivalry through the growing of coffee, which after about 1855 expanded very rapidly in São Paulo, and in the late eighteen-eighties there came a veritable fever of coffee-planting. Supplied with an incidental protection by the tariff laws of the country, manufacturing developed to some extent, especially in connection with the staple products of the country. Foreign commerce increased greatly, as is indicated by the fact that in 1840 its total value was fifty million *milreis*, and in 1887 it was ten times that amount.

Probably the greatest factor in the economic development of the country, next to the establishment of peace, was the building of railroads, encouraged by a law of 1853 by which the government guaranteed a fair interest on the capital invested in the enterprise. The earliest line was begun the year before, and was intended to run from Rio de Janeiro to the foot of the mountain whereon was Petropolis, the summer capital of the emperor. The first section of the road was opened to traffic in 1854, and other parts were built within the next few years; but it was not until 1883 that the cog tracks up the mountain were completed. By this time other lines had been built, including one which came to be called for the emperor the Dom Pedro Segundo Railroad. It originated from a decree of 1852 authorizing the construction of a road from the national capital to important points in São Paulo and Minas. A company was formed with $19,000,000 capital, and with Christiano B. Ottoni as its president; but because of the very mountainous character of the country the undertaking proved more expensive than was expected and too much for private enterprise. In 1865, therefore, when the road had been built as far as Barro de Pirahy, the imperial government undertook its completion. However, the work on it as well as on other lines progressed slowly for the next few years because of the war with Paraguay, and in 1870 the country had a total of only about six hundred and sixty miles of railways. The conflict over, under the energetic ministry of Viscount Rio Branco a new impulse was given to railroad-building, and the pace was maintained by his successors. By 1883 the lines exceeded thirty-two hundred miles; by the close of 1888 more than six thousand miles were in operation and as many more were projected or under construction. After 1880 the government began to follow a policy of gradually buying up private lines and leasing them to companies.

Telegraphic communication, which also fostered the economic development of the country, began in 1852 and spread rapidly; by the close of 1888 there were twelve thousand miles of lines in operation.

Also of great importance to the economic development of Brazil was immigration, which the government made a serious effort to encourage. Until about 1870 the number of foreigners coming into the country was comparatively slight and was made up largely of Portuguese, who scattered throughout the coastal section, forming a valuable asset because of their superior industry. Next in importance were the Germans, the first of whom had founded the colony of São Leopoldo in Rio Grande do Sul in 1824. For twenty years after that, there were few newcomers, because of internal disturbances, but after 1843 the government of the province adopted the successful policy of encouraging immigration by paying subsidies to colonies formed and premiums to agents who should bring them about. By 1859 there were somewhat more than twenty thousand Germans in Rio Grande do Sul, but after that date, owing to the unfavorable reports sent home by many of them, German immigration was reduced to a very small figure. Most of the Germans engaged in tilling the soil or cattle-raising in the eastern part of the province; but, as time passed, a considerable number advanced north into Santa Catharina. Immediately after the Civil War in the United States hundreds of Southerners, attracted by offers of land and by the existence of Negro slavery in Brazil, made little settlements here and there from Rio Grande do Sul to Pará; but many of them, disappointed by the hardships and the unfamiliar environment, returned to the United States within a few years, and the remnant joined one of the original settlements in São Paulo round what later came to be called Villa Americana, a short distance from the provincial capital. Not being used to work, however, these immigrants were on the whole not valuable assets to Brazil. Individual for individual, the Italian laborers, who began to arrive after 1870 and to settle in the south, especially in São Paulo, were more useful additions to the population. As the years passed the stream of Italians steadily increased in proportion to other nationalities. In 1870 the total number of immigrants to Brazil was a little over 9000, in 1887 almost 55,000 arrived, and in 1888 a flood of 131,000 came through the two main ports of Rio de Janeiro and Santos, and a small number entered by other doors, particularly in the south.

Under Pedro II, however, Negro slaves continued to supply most of the labor. By about 1850, when slavery reached its height, there were perhaps as many as three million African bondmen in the country, which then had a total population of something like eight million. In accordance with a treaty made with England, the Brazilian government had passed a law prohibiting the African slave trade and providing that all blacks imported after November 7, 1831, should be declared free; but the measure remained a dead letter for twenty years. Thousands of Negroes were imported from Africa every year, usually in slavers flying the flag of the United States—to avoid search by British vessels—and were sold in Brazil. So open was the traffic as hardly to be called smuggling. It was on a par with the illegal importation of Africans into Charleston, South Carolina, and other southern ports of the United States in the half-century that preceded the Civil War. Not until 1853 did the imperial government make sufficient effort to stop the trade. The reform was produced partly by pressure from England; but the Brazilian public conscience was awakening on the subject, somewhat stimulated, perhaps, by the fact that yellow fever, believed to have been introduced from Africa, had recently visited Brazil.

Stimulated by the lesson furnished by the Civil War in the United States, abolitionist sentiment increased rapidly in Brazil in the eighteen-sixties, and, with it, voluntary emancipation. Societies were organized to work for the elimination of slavery, and much was written on the subject. The emperor favored abolition, but felt that it should be gradual; the Liberals were in sympathy with this, but the Conservative sentiment was opposed. In 1866 and 1867 a gradual emancipation measure was seriously discussed, but the Paraguayan War delayed action. In 1868, however, the emperor did create a commission of the council of state, headed by a Liberal leader, Joaquim Nabuco, to draft a project of a law in harmony with sentiment for reform. This became the basis for a measure enacted on September 28, 1871, known as the Rio Branco law. This law, named for Viscount Rio Branco, who was largely responsible for getting it through the assembly, provided that all children born after that date should be free, but that they should be apprentices of their masters during their minority unless their mothers desired to hand them over to the government at the age of eight.

One of Pedro's greatest interests was the spread of education. He fostered it in different ways, though by the Acto Addicional primary and secondary schools were placed under control of the provincial assemblies. It was not till after the final pacification of the country had been achieved in 1849, however, that much was accomplished by local or national government, and even in 1857 there were in the whole country only 2595 public primary schools, enrolling 70,000. After the close of the Paraguayan War, momentum was given to educational advancement as well as to other lines of progress. Zeal in this direction was increased by the emperor's stopping a movement to erect a statue of himself to celebrate the victorious end of the war, through writing the committee in charge of raising the funds and urging that the money be used instead for the erection of new primary-school buildings and the improvement of existing ones. Nothing would be more pleasing to him, he declared, than to have the new era of peace and prosperity begin with a great act coming from national initiative for the purpose of popular education. In 1886 the public primary schools numbered 6605, with 213,670 pupils. Public secondary education was provided by *lyceos* in the provinces, and in the capital by the Collegio Imperial de Dom Pedro II, which was attended by the emperor's three grandsons. For the training of teachers a number of normal schools had been established by the close of the eighteen-eighties, and there were also schools of law, medicine, pharmacy, and agriculture in different parts of the country. Ouro Preto, capital of Minas, had a school of mines; in Rio de Janeiro there were an academy of fine arts, a conservatory of music, an astronomical observatory, and institutes for deaf-mutes and the blind. Numerous private schools also were in existence by 1888. Some of them were secular, others were in charge of the religious orders of the Roman Church, and a few had recently been established by Protestant missionaries.

There were likewise a number of literary organizations and learned societies in the country, and various museums and libraries, the most important being the National Museum and the National Library in the capital. The latter contained one hundred and seventy-one thousand volumes. Full liberty of the press was enjoyed, even during the Paraguayan War, when the attacks upon the government were often bitter; and in 1884 the newspapers (many of them in the languages of recent immigrants) numbered about six hundred.

In the reign of Pedro II significant changes took place in the Roman Church in Brazil. For more than twenty years after the regency had ended the clergy filled political positions, and the spirit of clerical tolerance and liberalism which had made possible such men as Bishop Caetano and Padre Feijó continued. But priests of this type made little contribution to the spiritual standards of the nation; for, as the Brazilian scholar Manoel de Oliveira Lima puts it, the lives of such as Feijó "were not positively edifying, as most of their useful time was taken up by political duties, and whatever remained was only too short for the charms of a family, for the great majority of the clergy had abandoned a life of celibacy."[1] In December, 1864, however, Pope Pius IX issued the famous Syllabus for the episcopate, containing a long list of errors of belief and morals, which swayed the clergy of Brazil as well as those elsewhere. Though it created something of a spirit of bigotry in Brazil, it helped to improve clerical morals in that country and gave the priesthood less time for affairs of state. There was no clerical party in Brazilian politics either before or after the Syllabus was issued. The position of the Church was fairly well indicated by the provision of the constitution that the bishops of the country should be nominated by the emperor, subject to confirmation by the Pope,—the latter being a mere formality,—and that no papal bulls or apostolic letters should have force in the country without imperial sanction. That the prohibitions were vital was shown in 1873, when two bishops who tried to put into effect an unapproved bull were tried by the supreme court of the empire, were sentenced to four years' imprisonment, and were sent to prison, though later they were pardoned by Pedro II. In 1872 a clash of a different sort showed the desire of the Holy See to keep on friendly terms with the imperial government. The trouble began with orders from the bishops of Olinda and Pará to the *irmandades*, or men's societies of the local churches, to expel from membership all men belonging to the lodges of Freemasons, though in Brazil the latter were not unfriendly to the Church, and many eminent people, including the emperor himself, were Masons. Some of the brotherhoods refused to comply, and the bishops placed them under an interdict. The imperial government at once secured papal disapproval of the act and ordered the removal of the interdict. The prelates refused to comply, and were sentenced to prison with hard labor, a circumstance which caused many of the Brazilian clergy to lose sympathy for the imperial government and to carry with them in sentiment the more churchly of their parishioners.

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[1] *Evolution of Brazil compared with that of Spanish and Anglo-Saxon America*, p. 76.

A little before these clashes with the Church came, the empire began to lose some of its support in more definitely political quarters. In December, 1870, a new Republican party announced its birth in the first number of its official organ, *A Republica* (The Republic). A manifesto appearing in the paper, signed by fifty-seven members of the new political group,—some of them officers of the government,—set forth the needs for republican organization and proposed a constitutional convention to plan for social and political reforms. The call met with response, for most of the provinces strongly desired more economic freedom as well as political freedom. Republican clubs were soon formed here and there in the empire, especially in São Paulo (which became the center of the propaganda), Minas Gerães, and Rio de Janeiro; and republican and federalist sentiment grew.

Some years later dissatisfaction with the imperial government developed in the army, owing partly to the influence of Benjamin Constant, a teacher in the military school in the capital, whose positivist philosophy strongly fostered republican principles of government. The officers of the army also developed a touchiness about their rights and began to dabble in politics. In 1883 one of them in a letter to a Rio paper criticized a bill which had been introduced into the senate. Consequently the government ordered that army officers secure consent of the minister of war before sending contributions to the press; but a military court decided that the soldiers had a right to express their views freely in the newspapers, a decision which the government refused to accept. General Manoel Deodoro da Fonseca, vice president of Rio Grande do Sul, which had been showing signs of renewed turbulence, supported the army against the government, charging the latter, in an open letter to Pedro II, with injustice to the soldiers. This led the government to yield in the matter in question, which greatly weakened its prestige, whereas the army grew politically more aggressive.

The situation was made more difficult by the fact that the emperor's two sons had died in infancy and that his only remaining child, Isabel, was rather bigoted and apparently more autocratic than her father and lacked his lovable qualities. What seemed more serious, her husband was Gaston d'Orléans, Comte d'Eu, grandson of Louis Philippe of France, and was under suspicion as a foreigner, for he had never attempted to win the confidence and affection of the Brazilians. As Pedro II became advanced in years the possibility of future domination by the French Comte d'Eu grew increasingly distasteful to many Brazilians.

It was the slavery question, however, which knocked out the last props supporting the empire. The Rio Branco law of 1871 merely gave momentum to the abolition movement and greatly increased antislavery agitation. In consequence, the provinces of Ceará and Amazonas freed all their slaves in 1884. The next year an imperial law was enacted providing that all bondmen be liberated upon reaching the age of sixty. These various measures, joined with a marked increase in voluntary manumission, promised the practical elimination of African servitude within a generation, for in twelve years the number of slaves had been reduced by about 50 per cent.

Nevertheless the demand for immediate and complete abolition grew more insistent and more general, and the slavery system showed serious signs of a complete break-down. Incited by immigrant laborers from Europe (especially the Italians of São Paulo), who resented the unequal competition of slave labor, African bondmen in increasing numbers fled from their tasks to freedom in the forests. Since the authorities of the province were not strong enough to hunt out and recover the hosts of fugitive slaves, masters appealed to the central government for aid in 1887. In response national troops—none too loyal to the emperor and more or less antislavery in sentiment—were sent to São Paulo to capture the runaways, but when the soldiers learned the nature of their task they mutinied.

This situation brought the slavery question squarely before the imperial government, at the time headed by the Princess Isabel acting as regent for her father, who was in Europe convalescing from a serious illness. The princess, perhaps as a result of her confessor's influence, was a more ardent abolitionist than the emperor, and made use of what had happened in São Paulo to urge immediate and complete emancipation. The conservative, proslavery element in the population was the chief support of the imperial authority, and Isabel's ministers, who were of that political group, warned her of the disaster likely to result from the execution of her wishes; but the regent was firm and is said to have declared that the slaves must be freed even though their emancipation cost her throne. As a result of her insistence a bill was introduced into the chamber of deputies on May 8, 1888, by Rodrigo Augusto da Silva, minister of agriculture, declaring slavery extinct in Brazil and revoking all acts to the contrary. For three days the measure was debated, with Joaquim Nabuco as an especially strong champion and Andrade Figueira as chief opponent. Figueira took the ground that uncompensated emancipation was unjust to the slave-owners. The bill passed the house on May 10, and a few days later it was approved by the senate and the regent. On May 13, 1888, was proclaimed the law which freed all slaves within the Brazilian empire, numbering about seven hundred thousand. A five-day holiday period was proclaimed to celebrate the event. Those who did most of the rejoicing were the laboring classes, the abolitionist leaders, and the freedmen themselves. The Conservatives who had lost their slaves felt deep resentment and, as had been predicted, turned against the government which had failed to protect them in what they regarded as their rights. The abolition law of May 13, 1888, proved a deathblow to the empire. As the months passed, criticism of the imperial régime increased.[1]

A new handle was given to the disgruntled by the fact that the Liberal cabinet created on June 7, 1889, was unable to reform the serious abuses existing in the government—especially the practical strangling of provincial authority—which had long been a standing grievance. Even before the new ministry had an opportunity to try to bring about a change for the better, the drift of national sentiment was indicated by a member of the chamber of deputies who on June 11, 1889, shouted "Down with monarchy! Long live the republic!"

By November, 1889, the feeling against the empire had been crystallized into a specific plot for its overthrow. The leader in this was Benjamin Constant, who, unlike many other Republicans, was unwilling to wait until the death of Pedro—for whom there was still much affection—to proclaim a republic. Constant's chief collaborators were Generals Manoel Deodoro da Fonseca and Floriano Peixoto. In the early morning of November 15, 1889, Deodoro, commanding the second brigade from the barracks in Rio de Janeiro, seized control of the chief government buildings. On the same day the rest of the army quickly went over to the revolutionists, the cabinet resigned, and the emperor was arrested at Petropolis and brought to Rio. Meanwhile street crowds busied themselves with tearing down and destroying emblems of monarchy. Before nightfall Deodoro had issued a manifesto declaring Pedro II deposed and proclaiming a federal republic. A provisional government was set up with Deodoro at its head. There was a general falling away from the emperor. Every provincial governor joined the revolution on hearing of its existence. The change was made without loss of life and practically without bloodshed. Baron de Ladario, minister of marine, practically the only officer who stood by the emperor, though shot for refusing to surrender to the revolutionaries, recovered from his wounds. No indignity was shown to the deposed monarch, who was offered a pension by the provisional government; this he refused to accept. On November 17, 1889, Pedro II, accompanied by his family, left for exile in Portugal. Here he died two years later.

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[1] The feeling against Isabel was aggravated among the Liberals by the defeat, through her influence, of a bill giving full religious liberty, which would have permitted Protestants to have steeples and bells on their churches (see footnote on page 689).

The Republic

The provisional government promptly issued a circular assuming responsibility for all obligations legally contracted by the empire. This made a favorable impression upon Brazil's neighbors in the Western Hemisphere, soon resulting in recognition of the new order by the United States and by various Spanish-American governments.

In December, 1889, a committee of five was appointed to draft a constitution for the federal republic of the "United States of Brazil." Its report—modified somewhat in the direction of the Constitution of the United States of America by Ruy Barbosa, a member of the provisional ministry—was laid before the representative constituent assembly, which met the following November. Three months afterwards, on February 24, 1891, the new constitution was promulgated. It provided for the three customary departments of government: legislative, executive, and judicial. The general lawmaking body, called the national congress, was to be composed of a senate and a chamber of deputies, the former representing the states and the latter the people. Each of the twenty states and the federal district was entitled to three senators elected by direct vote for nine years, one third going out every three years. The presiding officer of the senate, who was given a deciding vote, was to be the vice president. Members of the chamber of deputies were to be elected for three years on the basis of population, but each state was to be permitted at least four representatives. In general, the powers of congress were the same as those of the legislative body of the American Union.

The president and vice president were to be elected by direct vote for a term of four years, and the former was not to be eligible for immediate reëlection. In case either of the two died before half the presidential term had expired, a new election must be held. The parliamentary system was definitely precluded through granting the president the right to appoint and remove his ministers and making them responsible to him only. These officers were furthermore prohibited from being members of congress and from appearing in its sessions.

The judicial power of the land was to be headed by a supreme court of fifteen judges, to be appointed by the president and to hold office for life unless removed by judicial procedure.

The states, which were authorized to form constitutions in harmony with the organic law, were given extensive powers and were laid under few prohibitions. Unlike the procedure in the United States of America, they were given possession of all mines and public lands within their borders, except for such territory as the national government might need for the erection of forts, the building of railroads, and other national services.

National suffrage was granted to all men who were able to read and write except beggars, members of monastic orders, and common soldiers; but this gave a very limited electorate, for the great majority of the population were illiterate.

An extensive bill of rights was included in the constitution. Among its provisions was a grant of freedom of public worship to all cults; states and central government were forbidden to "establish, subsidize, or embarrass the exercise of public worship." This was in harmony with a decree of January 7, 1890, enacted by the provisional government, by which Church and State were separated. Furthermore, all instruction in public institutions must be laic.

With the adoption of this carefully considered constitution, Brazil was ready to launch fully upon a republican career. All was fairly serene, and it seemed to augur well for the future that the nation had been able to free seven hundred thousand slaves and to change from an empire to a republic without warfare and with but little disorder. However, there was serious trouble just ahead.

Before adjourning, the constituent assembly started the new government by electing Deodoro da Fonseca as constitutional president of the republic and Floriano Peixoto as vice president. There was abundant precedent in history for giving successful revolutionary leaders political offices made available through their efforts, and since Benjamin Constant was dead, these two army officers were a logical choice; but it was an unfortunate one, for Deodoro proved to be not only selfish and tactless but arbitrary, and he proceeded like a military dictator rather than a constitutional executive. His high-handed actions provoked opposition almost at once, ending in a quarrel with congress, which he illegally dissolved. He also disregarded the rights of the states, stirring a number of them to plan resistance. The navy, which was jealous of the army, likewise was roused to plot rebellion. In the face of this situation, which he had created, Deodoro resigned on November 23, 1891.

Peixoto, who succeeded him, was in some ways even worse. He was as arbitrary in his conduct as his predecessor and gave some cause for suspicion that he was deliberately planning to establish a dictatorship of indefinite tenure. Militarism was rampant, the state presidents who failed to bend to Peixoto's will were deposed, and extravagance, bribery, and corruption marked the administration. Opponents of the dictator were in danger of severe treatment, and Ruy Barbosa, who protested against the Prætorian policy in his *Jornal do Brasil*, fled the country in fear of arrest. In April, 1893, Admiral Mello, minister of marine, resigned his portfolio; some months later he started a naval revolt in the south. This resulted in eight months of fighting, the loss of thousands of lives, and the final defeat of the insurgents. Before the conflict was ended Prudente de Moraes Barros of São Paulo was elected president to succeed Peixoto. There were fears in some quarters that Peixoto would not yield the office, but these fears were not realized, and Moraes assumed control late in 1894.

When Floriano Peixoto went out of the presidency, Brazil's most serious experience with caudilloism ended, though the nation had by no means seen the last of meddling by the military element in political affairs; but the republican career of Brazil has on the whole been orderly, showing that much was learned about government during the imperial era. Occasional insurrections against the national government have occurred, but these have been quickly put down; fraud and corruption have existed in union and state politics, but they have tended to grow less; the country has no real political parties, but this is because there has been no vital question on which to divide since the formation of the republic; and though personalities rather than principles have dominated in the elections, usually the men elected to the presidency have been honest and public-spirited.

Prudente de Moraes Barros, the first civilian president of Brazil, was a Paulista lawyer belonging to the pioneer republican group of his state. He granted amnesty to all who had participated in the recent rebellion, put down uprisings in a number of states, and eliminated military methods from the government and numerous military men from the civilian offices to which they had been appointed by Peixoto. When a conspiracy against him centering in the military college at Rio was discovered, he closed the institution. The restoration of order and the ousting of militarism from the government were substantial achievements, and were the chief ones of his administration. The Moraes government could do little to remedy the financial situation, which was bad when the empire fell and had become much worse since. Annual deficits harassed it, and the country was flooded with depreciated paper money. To meet immediate expenses two new war vessels were sold, and the national revenues were somewhat increased by raising the import tariff; but in the absence of funds it seemed impossible to meet the large sum due in interest on the foreign debt in 1898.

Moraes's successor was, however, equal to the difficult task of beginning serious financial reconstruction. This was Manoel Ferrez de Campos Salles, another Paulista and pioneer republican, who had been president of his state. With the aid of the administration he had won the presidency against the candidate of the military faction. The election took place in March, 1898; and to prevent default on the public debt and a financial crash in the nation, the president-elect, who had given considerable thought to the problem, undertook to go to Europe and make some arrangement to satisfy creditors. In this he was successful. From the Rothschilds' banking house he secured a funding loan which permitted a three years' suspension of service on the debt, and arranged instead for the issuing of bonds bearing interest at 5 per cent. The Rothchild loan was to be guaranteed by the customs revenue from Rio de Janeiro and some other Brazilian ports, and the Brazilian government pledged itself to incur no other debt without the consent of the bankers and to arrange for the retirement of paper money to the amount of the loan.

This easing of the critical financial situation gave added prestige to the president-elect and enabled him to open his administration under favorable auspices. During the first half of it considerable attention was given to economic matters. Expenses were cut down as much as possible, and, in the interest of securing more revenue, congress passed laws increasing import duties and placing a stamp tax on many articles in common use.

For Brazil the turn of the century was a period of boundary settlements. The favorable award regarding the Misiones territory, already considered in connection with Argentina, encouraged the Brazilian government to try to end other difficulties over national limits. Two of these came up during the term of Campos Salles. One, which was with Bolivia and involved the Acre territory, has been mentioned; the other was over French Guiana. The difficulty involving the latter was caused by the inability of France and Brazil to agree over the identification of a river mentioned in the Treaty of Utrecht; since settlement by negotiation seemed impossible, it was decided in 1899 to submit the question to the president of Switzerland for arbitration. Brazil's side of the case was presented by a very able man, Baron Rio Branco, son of the viscount for whom the Rio Branco abolition law was named. The award, made in 1900, identified the Japoc River of the ancient treaty with the Oyapok. This was in harmony with the claims of Brazil, which consequently received practically the whole of the disputed area.

A dispute with England, also of long standing, involved the romantic region in which had been located the mythical lake of Parima and the golden city of Manoa, sought by Sir Walter Raleigh and other adventurers. In 1902 this question was submitted to the decision of the king of Italy. Joaquim Nabuco, aided by Baron Rio Branco, defended the claims of his country. As the evidence bearing upon the matter was very extensive and complicated, the award was not made until 1904. It gave to British Guiana about seventy-three hundred square miles of the disputed area and to Brazil about fifty-four hundred square miles.

During the next three years two other difficulties over national limits were settled, by direct negotiation. By a treaty signed in 1906, Holland and Brazil agreed that the boundary between the latter and Dutch Guiana should, from the French Guiana line, follow the watershed of the Serra Tumuc Humac to the source of the Oyapok River, this stream to form the dividing line to the Atlantic. The next year a treaty was made with Colombia settling a much more serious dispute which involved a third of the large state of Amazonas. To Brazil went most of the territory under controversy, as was true of the majority of the boundary settlements in which that country was involved.

The frontier between Brazil and Venezuela was undefined for some distance, but the territory involved was not extensive. In 1905 negotiations took place which were intended to end the question, but unexpected delays occurred, and the final treaty was not ratified until 1929. This treaty ended Brazil's last boundary dispute and completed the definition of its limits.

The successful presidential candidate for Brazil in 1902 was Rodrigues Alves, like Campos Salles a Paulista who had served as president of his state. During his term was begun the modernization and beautification of the national capital, which until after the opening of the twentieth century had remained in various undesirable ways unchanged since colonial days. Rio de Janeiro was now made more worthy of its magnificent natural setting. The moving spirit in planning the actual work of reconstruction was its prefect, Pereira Passos, but it took many years to complete the project. Numerous old streets were widened and straightened, and new avenues were built, including two especially beautiful ones, the Avenida Beira-Mar, following the shore of the bay for more than four miles, and the Avenida Central (later renamed the Rio Branco), running from the water front through the center of the city. Numerous fine public buildings were erected, among them a municipal theater and a new home for the National Library. Handsome parks were laid out, and an up-to-date lighting system was installed. New wharves and warehouses were built providing ample facilities for unloading and loading ships.

More important than these changes were those making for better health conditions through supplying the capital with pure drinking water, eliminating generally unsanitary conditions, and, especially, stamping out yellow fever. The man responsible for making Rio de Janeiro one of the most healthful tropical cities in the world was the eminent Brazilian scientist Oswaldo Cruz.

When the election of 1906 approached, the political leaders of the other states planned to break the São Paulo monopoly of the presidency by joining forces, and were successful. Their candidate was Affonso Penna, who three times had been a member of Pedro II's ministry and who, as governor of Minas Geraes, had since added to his reputation by founding upon a magnificent plateau a new capital for the state, named Bello Horizonte. When Penna came into office the general financial situation was decidedly better than in the dark days of 1899, but the fluctuating currency was still a serious problem. Since the new executive was elected on a platform promising fiscal reform, soon after his accession he had a *caixa de conversão*, or conversion bureau, created to aid in the internal public service through fixing the rate of exchange. The establishment, which opened for business in December, 1906, issued paper currency upon gold deposits, and this in turn was redeemable in gold at a fixed rate. The idea behind the arrangement was to make the inconvertible paper more stable by having the stable paper circulate beside it, and in the course of time to replace it entirely by the redeemable paper. Almost at once the beneficial effects of the *caixa* began to be felt. At the end of a year the redeemable paper in circulation was nearly equal to a sixth of the old paper.[1]

President Penna died in June, 1909. His place was taken by Nilo Peçanha, the vice president. When this change took place the campaign for the national election of the next year had already begun, and unusual excitement soon developed because of new aggressiveness displayed by the military element. Many of the civilian political leaders, remembering the days of Deodoro and Peixoto, distrusted army officers with aspirations to govern the land. Therefore the Conservative military candidate, Marshal Hermes da Fonseca, a nephew of Deodoro, found himself confronted with a very strong and able rival, the Liberal, Ruy Barbosa. The latter campaigned vigorously, making speeches in denunciation of various abuses which had existed under the republic, especially the interference of the military element in elections, the encroachments of the executive upon congressional authority, and the appointment of judges for political reasons. Nevertheless Hermes, who had some support from President Peçanha, was declared elected.

His opponents charged that the victory was won by fraud and military intimidation at the polls, and after the inauguration of the new president the navy revolted. The uprising was put down with considerable harshness. Bahia, the city of Ruy Barbosa's birth, was bombarded with government guns, and some of the leaders of the revolt were shot.

Hermes's term was marked by great financial depression, owing partly to sharp drops in the prices of coffee and rubber. The national revenues fell off badly; and this decline resulted in budget deficits, which made it necessary to arrange for payment of interest on foreign debts by scrip and for extension of the time for redeeming foreign securities. There was considerable unemployment, and among the rubber-gatherers who were without work serious disturbances took place.

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[1] Partly because of a change of policy in its management, the *caixa* became apparently futile after some years, and was closed in 1917.

For a time after the election of 1910 Ruy Barbosa and his supporters planned a hard antimilitaristic fight in 1914, but by the end of 1913 the financial crisis was so grave that for the sake of general harmony Ruy Barbosa gave up his candidacy in the interest of a man who might have the backing of the nation as a whole.

The winner of the election was Wenceslau Braz, who after some difficulty was able to secure another funding loan from the Rothschilds to meet immediate needs. Under the influence of the World War, however, the financial situation soon improved. In 1915 the price of coffee began to rise, and the end of the year showed a small surplus in the national treasury. During the last two years of Braz's administration the country experienced considerable prosperity, but governmental attention was much taken up by the problems created by the World War. The sinking of the Brazilian vessel *Paraná* by a German submarine on April 3, 1917, was followed by the severance of diplomatic relations with Germany on the tenth—four days after the declaration of war against Germany by the United States of America. As in the latter country, the existence of a considerable German element in the population added to the difficulty of the situation. The Brazilian minister of foreign affairs, Lauro Müller, a man of German descent, resigned, and his place was taken by Nilo Peçanha. The sinking of another Brazilian vessel some months later led in October to a declaration of a state of war against Germany. A conscription act was passed; physicians and aviators were sent to Europe; native food supplies were produced in larger amounts for allied consumption; and some vessels were made available for the allied navy. Though the part played by Brazil in the World War was a small one, it was larger than that of any other Latin-American country. The conflict had a great influence upon the country through giving it a decided start toward economic independence.

Manufacturing industries, in particular, were encouraged by the government, and, in response to this encouragement and to national needs, they showed great development in a few years.

Largely because of war conditions, there was no contest in the election of March, 1918, and ex-President Rodrigues Alves, the sole candidate, was named to the office; but illness prevented him from assuming control. He died in January, 1919. In the special election called for by the constitution, Ruy Barbosa was defeated by Epitacio da Silva Pessôa, at the time in Paris as head of the Brazilian delegation to the peace conference. During the year Pessôa took office the foreign trade of Brazil reached a figure never before attained; but in 1920 the postwar slump experienced by most countries began for Brazil and the government was confronted by grave economic problems. Resort was had to large new issues of paper money, which increased the fluctuation of this type of currency and failed to supply a remedy for existing ills. The plan introduced by the president to help the arid states of Ceará, Parahyba, and Rio Grande do Norte by building at government expense storage dams for flood waters was criticized as inopportune in view of the bad financial situation; and the national authorities at Rio were blamed in the popular mind for the disconcerting increase in the cost of living.

But in the midst of this period of depression the Brazilian people looked back gratefully upon almost a century of independence and prepared to celebrate in 1922 the centennial of their political freedom by a great international exposition. Confident that the republic was secure, the Pessôa government in September, 1920, passed a decree repealing the act of banishment issued in 1889 against the imperial family.[1]

In connection with the election of 1922 came serious difficulties, for the official candidate, Arturo Bernardes, president of the state of Minas Gerães, was believed by the military faction to be its ardent enemy. The Club Militar, made up of army officers interested in politics and headed by Hermes da Fonseca, worked hard to defeat him through pressing the claims of the opposition candidate, ex-President Nilo Peçanha. After Bernardes had been declared elected, Fonseca was guilty of insubordination and was arrested. This led his son, Captain Euclydes da Fonseca, to raise the flag of revolt in the fortress of Copacabana dominating Rio de Janeiro, and, on July 5, 1922, to shell the city. Later revelations made clear the fact that the rebellion under Captain Fonseca was merely a premature move to make his father dictator of Brazil and prevent the accession of Bernardes. However, President Pessôa was equal to the situation and quickly put down the revolt.

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[1] Some months later the remains of the Emperor Pedro II and the Empress Theresina were brought from Portugal to Brazil in charge of the Comte d'Eu and were placed in the cathedral at Petropolis. The prince of Braganza (grandson of Pedro II, and heir to the Brazilian throne) and his wife established themselves in Brazil and became much-sought-after ornaments of exclusive social circles.

Arturo Bernardes's administration was a very difficult one owing to disorders in the country, to the bad economic situation inherited from his predecessor, and to the determined hostility of the military element. He did, however, make considerable effort to cope with the situation. He ended a rebellion against state authorities which had been going on for some time in Rio Grande do Sul,[1] and he tried to meet the financial problem by cutting down expenses and reorganizing the fiscal system; but those who had been profiting by the evils in the existing order were hostile to the reforms. With the aim of placing the country upon a sound economic basis, he had a commission of British financial experts make a survey and offer recommendations. The report of this body, made early in 1924, advised measures in line with the general policy which the president had been trying to follow: strict economy and retrenchment, encouragement of foreign capital, the stimulation of national industry, and the freeing of industrial activities from state control.

Unfortunately for the plans for economy, in July, 1924, a revolt inspired by the disgruntled military element broke out in the state of São Paulo with the purpose of overthrowing

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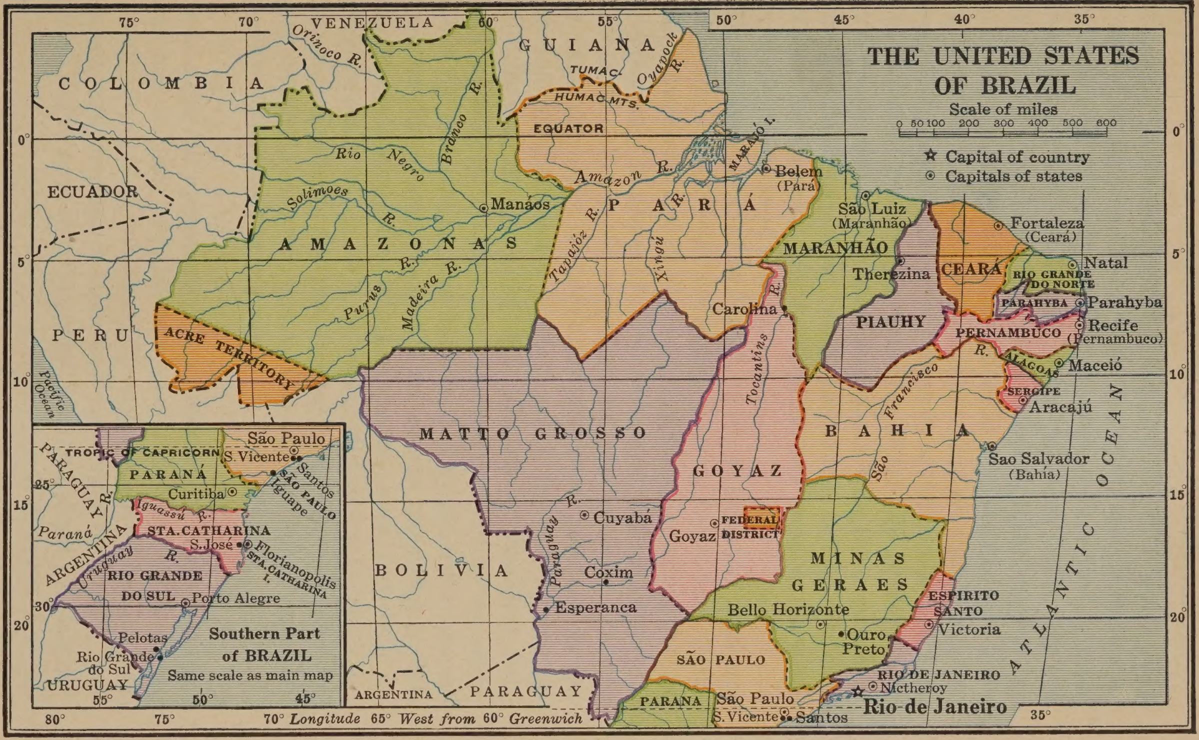
[1] This uprising and some other recent disturbances in the state were caused by the fact that Burges de Medeiros was monopolizing the office of state president. Through manipulation and fraud he repeatedly secured the three-fourths vote called for by the constitution to enable him to succeed himself. Since 1898 he had filled every term but one, and in 1923 he was "elected" for his fifth five-year term.



THE UNITED STATES OF BRAZIL

Scale of miles
0 50 100 200 300 400 500 600
★ Capital of country
⊙ Capitals of states
VENEZUELA
COLOMBIA
ECUADOR
PERU
Pacific Ocean
GUIANA
TUMAC
HUMAC MTS.
Oyapock R.
Orinoco R.
EQUATOR
BOLIVIA
ARGENTINA
PARAGUAY
ATLANTIC OCEAN
AMAZONAS
ACRE TERRITORY
PARÁ
MARANHÃO
PIAUHY
CEARÁ
RIO GRANDE DO NORTE
PARAHYBA
PERNAMBUCO
ALAGOAS
SERGIPE
BAHIA
MATTO GROSSO
GOYAZ
FEDERAL DISTRICT
MINAS GERAES
ESPIRITO SANTO
RIO DE JANEIRO
SÃO PAULO
PARANA
Rio Negro
Branco R.
Solimoes R.
Purus R.
Madeira R.
Amazon R.
Tapajóz R.
Xingú
Tocantins R.
São Francisco R.
Paraguay R.
MARAJÓ I.
Manáos
Belem (Pará)
São Luiz (Maranhão)
Fortaleza (Ceará)
Natal
Parahyba
Recife (Pernambuco)
Maceió
Aracajú
Sao Salvador (Bahia)
Therezina
Carolina
Goyaz
Cuyabá
Coxim
Esperanca
Bello Horizonte
Ouro Preto
Victoria
Nictheroy
Rio-de Janeiro
São Paulo
S. Vicente
Santos
0° 5° 10° 15° 20°
75° 70° 60° 55° 50° 45° 40° 35°
80° 75° 70° Longitude 65° West from 60° Greenwich 35°
Southern Part of BRAZIL
Same scale as main map
TROPIC OF CAPRICORN
PARAGUAY
Paraná
ARGENTINA
URUGUAY
PARANÁ
Curitiba
Iguape
SÃO PAULO
Iguassú R.
STA. CATHARINA
S. José
Florianopolis
STA. CATHARINA I.
Uruguay R.
RIO GRANDE DO SUL
Porto Alegre
Pelotas
Rio Grande do Sul
25° 30° 15° 20°
55° 50° 45°

Bernardes. The rebels captured the city of São Paulo, but at the end of three weeks they were forced by federal troops to withdraw, and resistance in this quarter soon ended. Minor uprisings also occurred in some of the northern states. By the early part of 1925, however, peace had been restored; but for most of the remainder of the presidential term the undependable state of affairs caused the administration to maintain what amounted to martial law in various parts of the country, including the national capital. Nevertheless Bernardes proceeded to reform the economic system in accordance with the suggestions of the British experts, and before his term ended he was able to reduce the financial deficit somewhat and to show other results in the direction of reform.

His successor, elected in March, 1926, was another Paulista, Washington Luis Pereira de Souza. During more than thirty years in public service, filling various offices, including that of state president, Washington Luis had shown energy, firmness, and unusual ability as an organizer and administrator. Shortly after becoming chief executive he put down uprisings in the south and west and, early in 1927, ended the rule by martial law. Following the general policy adopted by President Bernardes, he worked to better the financial situation of the country, but the undertaking was handicapped by general economic depression due to many causes. One remedy attempted by the administration was the building of motor roads, especially in the middle coast states, with the aim of stimulating material development. Funds for the undertaking were to be secured from higher import taxes upon automotive vehicles, tires, gasoline, and other automotive necessities.

During the forty years since the establishment of the republic, Brazil has, in view of handicaps, made considerable progress, especially along economic lines. In consequence of the abolition of slavery the shortage of labor was for a short time acute, but the need began soon to be supplied, for the federal government and some of the states made renewed efforts to encourage immigration. The very fact that slavery no longer existed in Brazil was an attraction to the laboring element in Europe; but foreign immigrants for the most part went to the central and southern parts of the country. Labor in the north was largely supplied by natives, especially Negroes and aborigines.

Though investigations of the last century indicate that Brazil is very rich in minerals, because of lack of capital, of transportation facilities, and of mining experts the nation has done little to exploit these natural resources. The mining of coal has developed in the past few decades, and is carried on in São Paulo and the states to the south of it, Rio Grande do Sul being the most productive. During recent years the country has produced about half the coal needed for domestic purposes. Probably most of the gold ore extracted is gathered by individual natives using primitive methods, but Minas Geräes has mines dating from the colonial period that are worked in a modern manner and a few new ones have been opened, most of the capital employed being English. The largest mineral export for many years has been gold, which, however, has averaged only a little over $2,000,000 in value annually. Manganese, coming largely from Minas, was mined and exported in considerable quantities during the World War. The total value of minerals exported during the republican period has averaged about $4,000,000 annually.

Of more economic importance has been the exploitation of natural vegetable products; and yet so great was the country's original endowment in this regard that when the twentieth century opened the most extensive virgin forests in the world were those of Brazil. During the period under consideration the demand for medicinal herbs, usually gathered by individuals from widely scattered areas, continued. The collection of Brazil nuts from the forests of the Amazon and its branches was a rather fluctuating but growing activity. It is called the poor man's industry, since the only equipment needed is some sort of boat. Vegetable wax, the product of a palm tree, used as a substitute for beeswax, became of economic importance in Ceará. The cutting of lumber and cabinet woods increased somewhat, but because of inadequate transportation facilities the activity was largely restricted to sections close to river banks and to the few railroad lines penetrating the valuable intervening forests and jungles. The demand for Brazilian dyewood declined, however, owing to the increased production of chemical dyes in other countries. On the other hand, mate, coming from the southern forests, especially those of Paraná, advanced in importance. The value of the tea sent out in 1905, mostly to the southern countries of the continent, was about $6,000,000.

By far the most important forest product of Brazil since the republic was established has been rubber, secured from three different trees from the Amazon basin, the earliest sought being the *hevea*. In 1890 about 16,000 tons of rubber were exported; in the next ten years the amount increased to 28,000 tons; in 1905 it reached 33,000 tons, valued at more than $60,000,000, and formed almost 90 per cent of the total value of the country's forest products. In 1910 the rubber exported netted almost double the amount of five years before; but the output of this year marked the height of the curve of production. After that began a decline in the industry, resulting from the new but rapidly expanding rubber plantations of the East Indies. The price obtainable for Brazilian rubber fell very rapidly, and with it the output. By 1923 the value of the rubber exported had dropped to about $8,500,000. This falling off in one of the leading industries has been an important factor of the economic depression in Brazil during the last twenty years, and has caused much misery, especially in the rubber-producing states of Pará and Amazonas.[1]

Pastoral activities, however, continued to expand, particularly in Minas and Rio Grande do Sul. In 1905 the exports from stock-raising were worth about $12,000,000, or three times as much as Brazilian minerals. The World War stimulated the production of cattle, but little interest has so far been shown in the improvement of breeds except on the southern frontier, in Rio Grande do Sul. In Minas and Matto Grosso humped cattle, descendants of the zebu, or Indian buffalo, introduced by the Portuguese because of their relative immunity from tropical disease and parasites, remain a favorite breed.

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[1] A partial revival of rubber production has been promised through a concession granted in 1927 by the state of Pará to a company formed by Henry Ford, the American automobile manufacturer. Upon a tract of land containing about twenty-five hundred square miles, Mr. Ford is preparing to produce through cultivation the rubber needed by his factories.

More important than stock-raising and the exploitation of forests and mines was tillage of the soil, for since its foundation four centuries ago Brazil has derived most of its wealth from planting and harvesting. Manioc and maize, which supply starchy food for most of the population, continued to be grown in most parts of the country, but chiefly for domestic use, though some manioc flour was exported. Meanwhile the staple crops of primary commercial significance shifted so much in relative value as to give a new economic importance to certain sections of the country. After about 1890 the cane country of the north was invaded by coffee plantations; and this led to a decline in sugar production in some of the states; but Pernambuco continued to have heavy cane crops, and sugar-planting spread southward, showing marked increase in Minas and Rio de Janeiro. Owing to the great increase in immigration, from about 1884 to 1912 much of the sugar was consumed at home, and exports of it showed a decided drop; but after the latter date the introduction of improved machinery caused an expansion of production and increase in the amount sent out of the country. Partly as a result of government encouragement, the growing of the cacao bean—largely a Bahia and Amazon Valley product—increased. The cultivation of cotton remained largely restricted to the north, from Bahia to the Amazon, Pernambuco being an especially large producer. After 1920 more scientific methods of cultivation were introduced, resulting in improved quality and larger output; but the amount of cotton exported did not increase in proportion, owing to the development of textile-manufacturing in Brazil.

Coffee has been by far the country's most important crop for more than half a century. The chief states producing it are Minas Gerães, Espirito Santo, Rio de Janeiro, and São Paulo, especially the last-named. Even as early as 1870 Brazil was providing half the world's supply of coffee; after that year the country gained rapidly upon the other coffee sections until in 1925 it was providing four fifths of the world's coffee, with a recent annual average of 12,000,000 bags, each weighing one hundred and thirty-two pounds. This represented an increase of more than 300 per cent upon the crop of 1870. More than half Brazil's coffee was grown in São Paulo by means of large colonies of immigrant laborers and was shipped out at Santos, the world's chief coffee port. The golden age of coffee-planting in Brazil was from about 1885 to 1896. In 1897 prices began to show a fluctuating decline owing to overproduction in the world as a whole; but the effect was not serious in Brazil until a few years later. To maintain profitable prices the state government of São Paulo prohibited increase in coffee acreage in 1903. About the same time there began voluminous discussion as to the best way to secure permanent relief from the coffee crisis. Extensive propaganda in foreign countries in favor of Brazilian coffee was decided upon, and also a valorization system. The latter involved purchase of the surplus crop by the government when prices were low, and its storage until prices increased sufficiently to be remunerative, when it should be sold. The plan was discussed early in 1906 at a meeting of the presidents of the coffee states of Minas, Rio de Janeiro, and São Paulo, and before the close of the year the Paulista government had put it into effect, securing the necessary capital largely through money advanced by foreign merchants and a small sum borrowed in London. The London loan was guaranteed by a tax to be laid upon the coffee when it was exported. Minas and Rio adopted the plan the next year and coöperated with São Paulo in its execution; at the same time the national authorities began the policy of making loans to the embarrassed states to enable their governments to buy up and hold the surplus coffee. Later the central government purchased stocks of coffee on its own account in years when the price was slack. Thus the valorization system was resorted to when the market was bad, and the protection afforded by it to the coffee-growers saved them from ruin; but the practice received much criticism from parts of the nation not interested in coffee production.

Manufacturing industry in Brazil may be said to date from the republican era. Considerable stimulus has been given to working up raw materials by means of tariffs affording a greater or less degree of protection. The eighteen-nineties showed an important development in leather-making in Brazil and a corresponding decline in the amount of raw hides exported. A little later the home-produced leather began to be worked up into footwear of different kinds, which supplied much of the domestic need. About the turn of the century plants for freezing meat and making beef extract were established in the south, especially in Rio Grande do Sul; but dry-salting continued. During this period improved methods of sugar-making were introduced. The making of textiles, the most important manufacturing industry of Brazil, began along modern lines in the late eighteen-nineties, when the first cotton mill was started there. From the outset the growth was steady until the World War, when the industry took a jump. In 1925 the country had about three hundred cotton-spinning and weaving factories, most of them being in the city of São Paulo, the manufacturing center of the nation.

Brazil's foreign trade has developed in proportion to the country's internal economic expansion, increasing several hundred per cent and maintaining a favorable balance. In 1905 the exports were worth about $233,000,000; in 1927 they were valued at $430,005,924.

The problem of transportation and communication was of almost constant interest to Brazilian public authorities after the establishment of the republic offered the promise of new economic development. In the interest of fostering commerce and shipbuilding, the constitution of 1891 restricted the coastal trade of the country to Brazilians, but the provision did not begin to operate until 1896. Owing to the lack of Brazilian vessels, foreign craft were then permitted to carry on commerce between Brazil's ports, provided that they flew that country's flag and included a certain proportion of Brazilians in their crews. To encourage shipping, heavy state and federal subsidies were given to companies operating on the Amazon, Paraná, and Paraguay rivers, and, to a lesser extent, to the coastwise trade.

The policy adopted during the last years of the empire, of fostering railroad-building by guaranteeing a fixed interest on the capital invested, was continued under the republic by the states as well as by the central government. But the vast extent of the country, the scattered areas of population, the topographical handicaps, and the lack of funds made it difficult to develop a system of national railways; consequently local systems, converging at the nearest seaport, were constructed to supply the needs of different economic areas or states. As a result of this policy, by the close of 1904 the 6000 miles in use in 1888 had expanded into 10,600 miles, about four fifths of them being owned by the federal government or by states. Twenty years later the railroads in operation totaled about 19,570 miles. Some of the new lines were built for the purpose of connecting existing systems to permit continuous railroad travel between remote parts of the country. Such were the roads completed about 1908 to connect Rio de Janeiro with Porto Alegre, in Rio Grande do Sul, nearly eighteen hundred miles away. About this time the Minas railroad system was connected with that of Bahia, and lines were under way to unite the systems of the northeast. Another important link, completed in 1916, made it possible to travel by rail from Rio de Janeiro to Esperança on the headwaters of the Paraguay River, near the Bolivian frontier. In 1922 nearly half the railroad mileage of the country was in the states of Minas and São Paulo.

In 1926, when Washington Luis came into office, the best means of bringing produce to market in regions at a distance from the steamship and railroad lines were usually dugout canoes or heavy oxcarts which creaked slowly over wretched roads to the nearest railroad station or port, frequently very far away. This fact made the new president decide to concentrate attention upon the construction of motor highways. There has also been a growing interest in aviation.

The telegraph system was developed in the interior largely through the labor of the Brazilian army, and now connects practically all points of any importance. After 1910 radio communication was introduced, and by 1929 the remote parts of the country were linked with the capital by it.

Since the establishment of the republic the population of Brazil has grown very rapidly. The census of 1890 gave about 14,333,000 inhabitants; the number had slightly more than doubled by 1920 and was 30,635,000, and in the autumn of 1929 the estimated number was 42,637,000. The increase was largely the result of immigration, which had been encouraged in the country as a whole, but especially by the state of São Paulo.

At first European laborers were brought to São Paulo under contract, usually by shipowners, who were generally paid the equivalent of passage money for each. By a law of 1899 this was changed and subsidy was paid only to those bringing in agricultural laborers. Later the state government, through agents, offered immigrants aid in the form of transportation from Santos to São Paulo, accommodations in the immigration headquarters in the latter city until the laborers were placed, and transportation to the final destination. For much of the last forty years—except during the World War, when there was a sharp decline—the annual immigration has totaled between 100,000 and 200,000. To São Paulo have usually gone at least half the newcomers, resulting in a growth of that state quite out of proportion to the others. In 1890 its capital, the city of São Paulo, had not quite 65,000 inhabitants; in 1920 the number had increased to 579,000. The population of the state is, in fact, largely foreign. Italians are in the majority, and almost outnumber three to one the Spaniards and Portuguese, who are numerically next in importance in the country; but more Spaniards and Portuguese than Italians have entered the country at Rio de Janeiro—as opposed to Santos, the port of São Paulo—and settled in Minas and other middle coastal states. Most other European countries are represented among the immigrants, but by comparatively small numbers of individuals. Syrians also have come in, most of them settling in the city of São Paulo. Since 1907, under encouragement of the national government, Japanese have arrived to the number of about 60,000 or 70,000, many of them settling in the northern states.

Most of the immigrants, whether they established themselves in the cities or in the rural districts, have become a part of the economic life of the country and have contributed to it and to national progress; but some who went into the rough pine-forested interior of Paraná and Santa Catharina—especially Poles, Austrians, Germans, and Italians—were cut off, like the early pioneers of the Appalachians, from outside contacts and practically buried alive, with resultant retrogression.

The pouring in of a great stream of European immigrants, most of whom have settled in the southern part of the country, has made that section predominantly Caucasian; the northern portion, where African slaves were once relatively most numerous, is largely of Negro blood; in the west, particularly in the vast, little-known state of Amazonas, the inhabitants are largely aborigines. Perhaps pure-blooded Indians do not, at most, total more than two million in the whole of Brazil, but there are many mixed breeds having Indian blood.

There is no "color line" in the Brazilian nation, and blood is mingled freely between races—social status, based upon wealth, family, and education, being more of a determining factor than ethnical affiliation. The aboriginal strain in the progressive Paulistas has been mentioned, and some of the most intelligent and distinguished Brazilians have possessed Negro blood.

Brazil's educational development since the establishment of the republic has lagged behind its material progress. The estimated illiteracy of the country in 1910 was 80 per cent. By 1920 it had been reduced to 75 per cent, but the reduction was perhaps more the result of immigration than of educational expansion in the country; for the census of that year listed Brazilian nationals as 77 per cent illiterate and foreigners as 48 per cent. The southern, or white, section of the country has the lowest percentage of persons unable to read or write; but the record varies from state to state, Rio Grande do Sul, with its large German element, having, next to the Federal District, the best record. The slow progress toward literacy made by Brazil is to be explained by the existence of several hundred thousand wild Indians,[1] the survival of Negro slavery until forty years ago, the climatic handicap, the lack of educational traditions, and the poverty of state and nation.

Primary education is under the care of the states and municipalities, whereas secondary and higher instruction are in charge of the central government as well as of the states. In 1920 there were in the country as a whole 21,748 public primary schools with about 1,250,000 children enrolled, and 450 secondary schools, with perhaps 48,000 pupils. The Collegio Pedro II in Rio de Janeiro was early made the standard for public and private secondary schools wishing recognition by higher governmental institutions. Various private schools contributed toward raising educational standards, notably Mackenzie College, founded by missionaries from the United States of America and incorporated in 1891. After 1926 a number of the more advanced states began to take more interest in improving their public schools. By 1929 a vigorous educational reform movement was under way, particularly in the states of São Paulo, Minas Gerães, Rio de Janeiro, and the Federal District, and marked progress was being made.

Brazil offers little opportunity for training in the liberal arts beyond the secondary school; but there are various professional and technical institutions for teaching the principles of education, agriculture, engineering, law, and medicine. In 1915 the schools of law and medicine of the national capital and the polytechnic institute there combined to form the first university of the country.

Various other institutions besides the schools contribute to the intellectual stimulation of the country and to scientific knowledge, especially in the field of tropical medicine. The Botanical Gardens in the capital are among the most complete in the world. In the larger cities are museums and libraries, the best of which are the national ones, found in Rio de Janeiro.

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[1] Theodore Roosevelt, in his *Through the Brazilian Wilderness*, describes the Nhambiquara Indians as good-natured and modest, and unclothed by even a bead or a shred. Unquestionably these folk are good members of their primitive society; but it is a far cry from them to even a palm-thatched Brazilian primary school.

XXXI

LATIN-AMERICAN SOCIAL EVOLUTION SINCE 1825

THE peoples of Latin America, like man himself, are "not a *being* but a *becoming*": they are nations in the making. In the process occur differentiating changes, some of which are replacing former likenesses by notable contrasts. This evolution is partly the result of original differences in heredity and New World environment, which operated more rapidly after Spanish control had ended; but it has been much aided by outside influences.

Favorable climate, the sparseness of aboriginal population, the abolition of slavery, and the stability of government all contributed to encourage immigration. Hence great changes in racial proportions took place in Argentina, Uruguay, and Chile: the white foreigners absorbed and overwhelmed the aboriginal element. These three countries, with Costa Rica, Cuba, and the Dominican Republic, are the only ones predominantly white among the eighteen formed from the one-time Spanish Indies. In the other parts of Spanish America, with one exception, aboriginal blood is definitely prevalent. Venezuela apparently has about equal proportions of Indian and Negro blood, both of which are much greater than the white element. In Brazil the Ethiopian strain is stronger than the aboriginal one, and pure-blooded whites are apparently still in the minority despite the large European immigration. Haiti is very predominantly of Negro race.

By 1930 Argentina had the largest fraction of white blood of all the Latin-American countries, and in psychology and ideals it was unquestionably the most European. Mexico, on the other hand, where strong aboriginal self-consciousness had developed and its leaders were planning to build for the future on pre-Cortesian bases, was perhaps least influenced by Old World thought.

The passing of the centuries had likewise produced marked linguistic differences in Latin America. In Haiti a patois had become the tongue of most of the inhabitants, and French was largely restricted to the small literate element. The Portuguese of Brazil, primarily owing to aboriginal and Negro influence, showed changes in grammar, pronunciation, and vocabulary from the language used by Camões; sectional variations were marked also, the Negro influence being stronger in the north than in the south, where during recent decades Italian has had something of a modifying effect on the spoken Portuguese. Though the official language of the Spanish-American countries was called Castilian, it differed everywhere from the tongue used in Castile; but in some of the states—especially Cuba, Colombia, Ecuador, and Peru—the variation from the original was less than in others. Everywhere native words had been incorporated into the basic language, and aboriginal influence had helped to bring about other linguistic modifications—toward which, in Argentina and Uruguay, Portuguese and Italian likewise contributed.

During most of the century after independence Paris was the intellectual capital of Latin America as a whole, but the influence of France was especially strong in Haiti and in northern and eastern South America; French became a secondary language in Brazil; but toward the close of the nineteenth century new contacts began to be made between Spain and her former colonies, resulting in revival of pride in Spanish ancestry and increased Spanish influence. The celebration of the centennial of Brazil's independence likewise caused that country to be more closely drawn to Portugal. Before the new pull of ancestral ties began to be felt in Argentina, Uruguay, and southern Brazil, the great inpouring of Italians into these sections was bringing about new modes of thought and life. Practically from the beginning of the Latin-American national era the influence of the United States of America was strong in Mexico and the countries of the Caribbean, especially in Mexico. After the opening of the Panama Canal it was extended to the west coast of South America, causing English to be preferred to

French as a school study and leading more parents to send their children to the United States to be educated. The position gained by the United States through the World War tended to accentuate its influence in the parts of Latin America already mentioned and to awaken in the eastern part of South America a new interest in culture north of the Río Grande. Educators from these countries voyaged to the United States to study the school systems there, and in Brazil, particularly, important exhibits of works in English began to appear in bookshops, where before English and American writings had received scant attention.

The passing of a century brought religious changes and diversities. The Roman Catholic Church was disestablished in eight countries—Honduras, Guatemala, Salvador, Mexico, Brazil, Cuba, Uruguay, and Chile; in those where it remained the state religion wide extremes were evident in the influence it exercised. In Argentina it had lost its hold upon many of the dominant class; in Colombia it was still powerful and very influential. In all the countries Protestant missionaries had been at work, and in many of them they had made their presence felt. In Brazil, where by 1929 the Protestants were apparently strongest relatively as well as actually, they numbered about one hundred and fifty thousand. Here and in other countries where they had a definite foothold they exercised a double influence: directly on the rank and file, by their teachings, and indirectly on the Roman clergy, who were stimulated to greater religious zeal by the competition of the energetic missionaries. After the opening of the twentieth century Protestantism was confronted by the competition of theosophy among the upper classes and spiritualism among the humbler, especially in the cities of Cuba, Uruguay, and Argentina. In the remoter rural sections, from northern Mexico to Tierra del Fuego, millions of lowly aborigines were still worshiping the gods of their pre-Columbian ancestors, often without the thin veil of Roman Catholic terminology and form.

For the most humble of the natives, especially those of settled habits, independence from Spain made life on the whole more difficult. They were deprived of most of their lands, and debt serfdom in various parts had replaced the encomienda and related systems of colonial days. As late as 1910 such serfdom existed on a considerable scale in Mexico, Guatemala, Ecuador, Bolivia, and Chile; but by 1930 its hold was weakening everywhere except in Guatemala, and in Mexico the system had been outlawed and was rapidly passing away.

Negro slavery, on the other hand, entirely disappeared from Latin America during the nineteenth century. Haiti, where emancipation was the foundation of national independence, was the first to sweep aside the institution, and Brazil was the last. Practically all Spanish America, except Cuba (which was still under Spain) had abolished African bondage by 1855.

In 1930 a large proportion of the humblest element in Latin-American society—chiefly aborigines and crossbreeds—lived in much the same manner, in respect to shelter, food, and dress, as did their American ancestors of four centuries before. Their huts were generally primitive and comfortless; but during the past half-century the Araucanians, who were in an economically superior position, showed a marked tendency to replace their low, grass-thatched *rukas* by more substantial and roomy frame dwellings. In the hot lowlands men wore garb of European fashion, but in Yucatán, Tehuantepec, southern Chile, and various other parts the artistic dresses of the native women had been changed little more in style by the wars for independence than by the Spanish conquest. On the high plateau of the Andes the Indians wore costumes which combined the fashions of the Inca régime with those of the Spanish colonial. The wool for the garments was woven on the most primitive of hand looms, and the Indian woman of last year, like her ancestresses of the high Andes a thousand years ago, spun the thread with distaff and spindle as she followed the herds of llamas in her charge.

In some parts, however, rapid economic development had a revolutionary effect on the habits of the humble as well as on those of the high. This was especially true of Argentina, where the fencing of the land and scientific ranching led to the practical extinction of the picturesque gaucho type before the first decade of the twentieth century had ended. In parts of more backward Paraguay gaucho psychology, style of dress, and mode of life have persisted down to the present. In southern Brazil the *gaúcho*, close kin to the Spanish-speaking gaucho, still lingered, but as a disappearing type. In less progressive northern Brazil the leather-clad resident of the arid sertão much resembled his great-grandfather in habits and thought. For most of a century the women of these sections wore loose cotton garments made, in Paraguay, with tunic and skirt artistically embroidered in colors, and the feet were unshod. Only in cities did the most ambitious attempt to follow the modes of Paris or Madrid. But the World War made even remote parts of Paraguay interested in Europe, at least to the extent of generally adopting transatlantic fashions in dress and in putting on shoes or sandals.

In the larger cities, where contact with Europe was fairly close, the upper classes at first tended to follow the styles of Spain, and even to elaborate them; thus, toward the middle of the nineteenth century the women of Buenos Aires wore almost incredibly large tortoise-shell combs in their hair. Later, especially after the rise of a very wealthy class, Argentina looked more to Paris for fashion models. But practically throughout Spanish America certain characteristic articles of dress (notably the manto and manta, or poncho) have persisted, have been adopted by foreign residents, and are worn by high and low.

In the cities and in the more developed rural sections some changes in food and diet took place. In the south temperate zone, where there was extensive immigration, foreign dishes were adopted, especially German and Italian favorites. Also ready-to-eat cereals and canned goods were imported from the United States. Hotels showed greater variety and introduced foreign dishes on their bills of fare. But in private homes throughout Latin America as a whole meals followed the same general lines as in the colonial era, with much stress upon animal foods; for it was not until the third decade of the twentieth century that interest began to be taken in a balanced diet and in the hygiene of nutrition, in general.

The last quarter of the nineteenth century introduced a marked architectural diversity into southern Hispanic America, especially in domestic buildings. This came largely through the influence of immigrants, especially Germans and Italians, who in many cases built their houses according to the models they had known in the homeland. But the old style of house, constructed around one or more patios, continued in Spanish America as a whole. After the turn of the century moving pictures and illustrated magazines from abroad further promoted the development of architectural variety.[1] More influential upon the homes of the wealthy in urban sections, especially in Cuba and the eastern part of South America, was the Mediterranean type of villa, which called for a discarding of the patio and for a more compact building surrounded by attractive grounds. In many instances the local architects showed a weakness for gaudy colors and over-ornate façades of stucco and tile. This was especially true in Uruguay. In Brazil, where the villa type was likewise introduced, a taste for an extreme amount of colorful decoration came through Portuguese influence by way of the centennial exposition of 1922. But many beautiful examples of modern domestic architecture are to be found in all the Latin-American countries. The skyscraper type of building during the present decade began in a rather timid way to make its appearance in a few of the cities, especially in São Paulo and Montevideo. In 1926 the latter boasted the possession of the tallest structure in South America. The finest of the Latin-American public buildings have been erected since the recent interest in renaissance architecture developed, and they have largely followed that style.

Until after the close of the nineteenth century, except in the sections where north Europeans—especially Germans and English—settled, there was little improvement in Latin-American sanitary conditions over what had existed in colonial times. The first serious impetus to reform came from the sanitation of Cuba and the Panama Canal Zone under the direction of American medical authorities. Some years later the International Health Board of the Rockefeller Foundation was created, and subsequently practically all the governments of tropical Latin America asked and received aid from the board's physicians in combating disease, especially hookworm and yellow fever. By 1930 much headway had been made against hookworm, from Mexico to Paraguay, and the people in the infected areas had been taught preventive hygiene; and yellow fever had been stamped out of the whole of Latin America except Brazil, where it is proving difficult to get rid of completely. The activities engaged in for the elimination of these maladies stimulated the Latin-American leaders to interest in improving health conditions in general. Attention was given to city plumbing, the teaching of hygiene was introduced into the schools, efforts were made to secure better-trained physicians, and some of the more advanced countries began to provide proper facilities for the professional education of nurses, a matter largely neglected until the present decade.

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[1] In 1926 a farmer of German-English descent in southern Chile told the present writer that he was remodeling his house according to a plan for an "American bungalow" given in the *Ladies' Home Journal*, published in Philadelphia, to which the family subscribed.

During the nineteenth century the amusements and social pastimes of the Latin Americans as a whole continued to be those of the colonial era. Only here and there did change show itself. Chile early permanently outlawed cockfights and bullfights, but in most of the other countries they remained favorite diversions. A decade or two after independence, hostesses in many South American cities began to serve guests Oriental tea in fine porcelain cups, as "smarter" than the locally produced yerba mate; but the rural element continued to partake of the mate, served in gourds or silver vessels and sipped through *bombillas* (little pumps) of reed or silver, which passed from mouth to mouth as freely as the common communion cup in conservative American churches. Meanwhile, the women of the humbler classes, from Mexico to Chile, apparently developed a greater fondness for smoking huge cigars, often made by themselves, whereas the men, high and low, showed a preference for cigarettes.

About the opening of the twentieth century important changes took place in the manner in which leisure was spent. With the amassing of great fortunes, especially in Cuba, Brazil, Uruguay, and Argentina, horse-racing became a more fashionable sport among the upper classes, and palatial jockey-club buildings were erected in the large cities. This new interest somewhat reduced the popularity of cockfighting and bullfighting, the prestige of which was soon more seriously undermined by the development of interest in sports, especially baseball and football. Men of all classes participated in these games, particularly in Uruguay, where great enthusiasm for athletics was roused and home teams soon began to win important international honors. The acquisition of wealth in various countries, followed by greater leisure for culture, resulted also in the construction of magnificent national opera houses and theaters in various capitals, and in some of them were presented programs in which appeared the best European artists. At about the same time moving pictures—most of them made in the United States—began to be the favorite indoor amusement of those unable to afford the price of tickets to the theater or opera.

Social manners in Latin America in the third decade of the twentieth century showed differentiations which had doubtless already begun a hundred years before. In the more isolated countries, such as Colombia and Ecuador, much of the elaborate artificiality and courtliness of manner characterizing old Spain was retained; but the peoples more exposed to external contacts through immigration or revolutionized through industrialism, such as those of Cuba, Uruguay, and Argentina, had lost most of the traditions of Spanish etiquette and were rather characterized by informality, bluntness, and directness of approach.

Through most of the nineteenth century the status of women in Latin America showed little change. Few educational opportunities were offered them, practically all the professions were barred against them by tradition, and they had no political rights. They were thought inferior to men, and from the cradle to the grave they were under the tutelage of their fathers or their husbands. The world in which they lived was the man's world, shaped in accordance with his ideas and wishes. As Edward A.

Ross, the sociologist, has put it, Latin-American society was, and still is, androcentric,—over-masculinized. Women were not encouraged or permitted to make their contribution toward general social and national development. Matrimony and motherhood were still looked upon by all as the woman's sole function and purpose in life. With this in view, girls of the better classes continued to be reared in almost Oriental seclusion and to be carefully guarded and chaperoned when they went outside the paternal threshold. If by any ill chance they failed to arrive in triumph at the matrimonial altar, they often snatched victory from defeat by renouncing the world, assuming the nun's veil, and becoming the brides of the Church.

As the twentieth century approached, a slight change began to make itself felt, largely through the efforts of the women of the middle class, which was forming in the most advanced countries. Much of the incentive to the reform came from foreign contacts, acquired through sending girls abroad to study and through the Protestant mission schools established in Latin America. By these means much influence came from the United States, where women were two or three generations ahead of their sisters to the south. Chile was apparently the pioneer in the Latin-American woman movement. This is partly to be explained by the priority of that country in offering to women opportunities for higher education.[1] The important share which the women had in helping to win the War of the Pacific, through taking over the civilian occupations of the men,[2] doubtless stimulated in some of them a desire to play permanently a larger part in the life of the nation; but in the opinion of many Chileans the energy, courage, and independence of Chilean women are more the result of the strain of Araucanian blood inherited from their Araucanian foremothers and the example set by the enviable status of the contemporary Araucanian women.[1] In any case, by the close of the nineteenth century the women of Chile began to go about with more freedom than had before been granted to them, to take positions in business offices, and to enter professions which public opinion had formerly restricted to men. Soon afterwards a woman movement was apparent in other countries, especially Uruguay, Argentina, Peru, Mexico, Cuba, and Brazil. By 1927 women had been admitted to the universities and higher professional schools in all the Hispanic-American countries except Colombia. In the politically backward countries, such as Venezuela and the Dominican Republic, women were just beginning to study law and medicine, but in the more advanced countries—Chile, Uruguay, Argentina, Peru, Costa Rica, Mexico, and Brazil—they had for some time been practicing these and allied professions. Brazil was notable for the number of women who were trained engineers.

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[1] Perhaps the most influential of the early institutions offering to girls training beyond the grades was Santiago College, founded in 1880 by Adelaide Whitfield La Fetra of New York. It offered secondary as well as elementary instruction and soon became noted for the high ideals of living inspired in its pupils by Mrs. La Fetra.

[2] Among the occupations of men which women took over when the war opened was that of conductors on the street cars—positions which they subsequently retained, and at the present time most of the conductors on Chilean street cars and busses are women.

Meanwhile several states, including Mexico, Chile, Uruguay, and Argentina, had passed laws to improve the economic status of women, especially those of the laboring classes, and to insure their positions to women having children. Furthermore, law and public opinion in most of the countries held that marriage should not be regarded as disqualifying women from continuing in teaching and other professional positions.

For many decades after independence no organizations of women existed other than those connected with the Roman Church, except in Argentina, where, it will be recalled, Rivadavia helped the women to organize into a Sociedad de Beneficencia in 1823. This society survived and flourished. Women's organizations secular in character and varied in aim had been formed in various countries before the new century began; and by 1929 a number of countries possessed federations of women's clubs, the strongest being the Argentine Consejo Nacional de Mujeres, made up of groups engaged in benevolent, educational, literary, and other activities. By means of their organizations the women had also become engaged in coöperative international movements of their sex.

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[1] They have had more rights under tribal regulations than have the Chilean women under the laws of the republic.

Specific organized work for woman's rights did not get under way in Latin America until more than sixty years after the movement had been launched in the United States. The pioneer feminist in the former field was Paulina Luisi, a distinguished physician of Uruguay, who in the second decade of the twentieth century began writing and speaking in behalf of social reforms, among them more rights for women, including political suffrage. Wider interest was given the movement by the first Pan-American Conference for women, held in Baltimore, Maryland, in the spring of 1922 under the auspices of the National League of Women Voters of the United States. One of the most important results of this gathering was the formation later in the year of the Federação Brasileira pelo Progresso Feminino, by Bertha Lutz, secretary of the National Museum of Brazil. This federation, which soon became the most energetic of the Latin-American organizations of its type, included in its program better educational facilities for Brazilian women, the winning of complete civil and political rights for them, the protection of women and children, especially through legislative guaranties, and the promotion of permanent peace and justice throughout the Americas.

At about the same time woman's rights organizations were formed in a few of the other countries, but suffrage was given a subordinate place in their programs or was entirely omitted, owing to the fact that the liberal women who formed them realized that votes for women would be likely to create a Church question or aggravate the existing one. For instance, in Ecuador, where there had been no activities in the interest of suffrage for women, suffrage was suddenly granted them in 1928, which was regarded as a move of the clerical party to strengthen itself in national politics. Before this, suffrage had been granted to women in the Mexican states of San Luis Potosí and Yucatán, but was soon withdrawn in the latter, and by the spring of 1929 the right to vote had likewise been given them in six states of

Brazil—Ceará, Rio Grande do Norte, Bahia, Espírito Santo, Rio de Janeiro, and Minas Geräes.

The passing of a hundred years also brought to the Hispanic peoples some modification of the qualities of character which marked their ancestors during the colonial period, though most of the ancestral qualities lingered. The economic and industrial revolution, largely fostered by foreign capitalists, which began to take place in several of the countries near the close of the nineteenth century brought a greater degree of punctuality and dependability to business circles in the cities, and also an elimination of sentimentality in the interest of efficiency. Clerks were no longer so prone to write lovelorn verses during time supposed to be employed in a more utilitarian manner. The coming of the automobile and the airplane tended to make people more energetic and to cause them to place a new emphasis on the value of time. More important than these changes was the appearance, especially in the more advanced countries, of a spirit of altruism, which showed signs of displacing the unthinking almsgiving of earlier periods. Various factors contributed to this: the improved standards of the Roman clergy in some sections, the Protestant missions, the work of the Christian Associations established in some of the larger cities, the woman movement, the spread of education, and the general humanitarian spirit of the age. The fruits of the new spirit were seen in efforts to improve the condition of the downtrodden aborigines, to combat drunkenness (especially in Chile, where drunkenness has long been a serious problem), to better the condition of labor, to reduce infant mortality, and to give children a fairer start in life. Hence in some of the countries leagues against alcoholism were established; branches of the Red Cross were formed in most of them; dispensaries were started in the cities for providing babies with free milk; the juvenile court was introduced here and there; and the children were organized into Boy Scouts, Girl Guides, and similar groups. In short, by 1930 in even the most backward nations some attempt had been made, and in the most advanced ones much had been achieved, in the direction of conserving and improving their social and moral assets.

XXXII

LITERATURE AND ART IN HISPANIC AMERICA

> It is the glory and the goal of Art,
> That Art remains the one way possible
> Of speaking truth, to mouths like mine at least.
>
> ROBERT BROWNING, *The Ring and the Book*

THE unfurling of freedom's banner in Spain's and Portugal's American colonies gave a new impulse to literary activity there. Not only were orators and essayists furnished with fresh themes by political differences inviting thought and argument, but the deep emotional stirrings of the struggle for independence found natural expression in imaginative writing, particularly in poetry and song. Moreover, with the removal of the restrictions placed by Spain upon her colonies came more printing-presses to aid in the multiplication of literary products, resulting in further stimulation to writing.

In the century which followed, strong interest in literary pursuits was maintained in practically all the Hispanic-American countries; and writings, as C. O. Bunge puts it, were produced *con tropical frondosidad*[1] (with tropical leafiness). Much of the printed matter had little or no merit, but practically all the nations contributed something worthy to be classed as literature, and a number of them gave the world works of high value in prose and verse. Hispanic America, however, like Anglo-America, has not yet produced any writings comparable to the classics of the Old World.

The large literary output despite the very limited national reading public is to be explained by various factors: the desire for self-expression, especially the expression of emotions; the establishment of a periodical press which served as a vehicle for the publication of all types of writing; the founding of societies which encouraged literary effort through the awarding of prizes as well as through the association of kindred spirits; and last, but not least, the existence everywhere of an abundance of themes to tempt the pen. Love of country and the valiant deeds of Bolívar and the other heroes of independence continued their appeal. The internal political struggles of the states furnished material for those attracted by stirring events, as did the Indian wars. The relationship between whites and aborigines was a favorite theme, and many a romance in prose and verse was woven about the love of some valiant Indian youth for a beautiful Spanish maiden. Still more numerous romancers wrote about their own loves, real or imaginary. Some writers of novels and tales gave special attention to local manners, customs, and types, which they portrayed with varying degrees of success. Perhaps the subject of most general interest was the beauties of nature, especially the wild, rich loveliness of the tropics.

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[1] *Nuestra América*, p. 183.

Hispanic-American imaginative literature is unusually characterized by sadness: poets sing of unrequited affection; lovers rarely marry and live happily ever afterwards—instead, one of them is generally killed by the villain or dies a suicide in the belief that the beloved one has proven false; and a tone of melancholy, like an echo, haunts much of the poetry from the first verse to the last. Some of the sadness was a mere pose, following the literary fashion; but much of it was genuine. It has been attributed to the aboriginal blood flowing in most of the nations; but the difficult tropical climate had a depressing effect upon many, and the troubled history of Latin America was not conducive to lightness of heart and joy in life. Yet not all national literary groups were given to melancholy, and some individuals wrote in happy mood with wit and merry laughter running through their lines.

As in the case of the United States of America, for many decades Hispanic-American authors were dominated by Old World methods and models. French influence was especially strong, and Victor Hugo had countless imitators; but Spain's writers, notably the immortal Cervantes, were imitated by many in her former colonies, and Brazilian poets received inspiration and guidance from the great Camões of Portugal. Until about 1830 the European forms and traditions of the preceding century, following classical models, governed imaginative writing in Hispanic America; but after that the new romantic movement in Europe began to make itself felt. It resulted not only in more expression of sentimental emotion on the part of writers but in increased interest in wild nature and in the aborigines, the children of the wilderness. When romantic standards borrowed from the Old World and more or less adapted to local needs had held sway for nearly two generations, a reaction took place, launched by Rubén Darío, a Nicaraguan poet. Then Europe went to school to America. The new movement, known as modernist, was marked by the casting aside of stereotyped forms and traditions and by development along independent, individualistic lines according to the wishes and bent of the writer. It was a sharp change, reformatory in character, in the direction of greater freedom and naturalness. In consequence of it the romantic movement was supplanted by a number of different literary ideals, each having its group of followers. Among these were the French Parnassianism and symbolism.

SPANISH-AMERICAN LITERATURE

All the eighteen Spanish-American countries have produced at least pretty verse, pleasant to the ear. Only writers of distinction, however, can be considered here, and not all of these. Some of the countries which are very backward politically and in general progress have gained fame through the quality of their literature. An illustration of this is the Dominican Republic, which has produced many writers of worth. It is perhaps best known in a literary way as the birthplace of the Henríquez-Ureña family. Francisco Henríquez y Carvajal, already mentioned as president of the country, was a writer of some reputation; but his wife, Salomé Ureña (1850–1897), the educator, had more literary merit. Her verses, sad with the tragedy of Dominican history, are fine in form and inspiring through a courageous optimism. A collection of her writings, entitled *Poesías*, was published in Madrid in 1920. Pedro and Max Henríquez y Ureña, sons of these two writers, have won more fame than their parents, especially Pedro, noted for his *Antología Dominicana*, poems, and significant essays upon literary subjects. His brother has written poems and articles dealing with literary history.

Perhaps the best of a number of Guatemalan writers of international fame as well as the most unique is José de Batres y Montúfar (1809–1844), known especially for his *Tradiciones de Guatemala*, three merrily humorous tales.

More distinguished and influential than these was Rubén Darío (1867–1916), originator of the modernist movement in literature. He was born in León, Nicaragua, of partly Indian blood, but he lived in many lands and was largely cosmopolitan in spirit and genius. Practically orphaned in early infancy, Darío learned at first hand to feel the sadness he later expressed in his writings. He was a child prodigy, able to read at three years, and before reaching thirteen he was a regular contributor of verses to a local newspaper. Very shortly afterwards his numerous love affairs began. While he was still a boy in years he spent some time in Chile writing for newspapers of the country. Then, after visiting the United States, Spain, France, and some other lands, he went to Buenos Aires as consul from Colombia. Subsequently he wandered through various European countries, chiefly as writer for *La Nación* of Buenos Aires; but he returned to die in his native León. It was in Buenos Aires in 1888, when he was but twenty-one years of age, that Darío published his work, *Azul* ("Blue"), which began a new epoch in literary history. The volume—so named, the poet said, because blue to him was "the color of dreams, the color of art"—was made up of a number of poems and poetic prose tales. The collection showed that the poet had taken the best in method from other Spanish writers, added his own genius to it, and created a new style, clear, simple, and beautiful, to replace the cumbersome, conventional artificiality into which the romantic had degenerated. It was the prose, in particular, which made the new contribution of literary manner. In later writings Darío perfected his method. His *Prosas Profanas*, published in 1896, had more of grace, variety of meter, and music than *Azul* and helped to stimulate a reform in poetical composition, as did the earlier work in prose. The collection called *Cantos de Vida y Esperanza* ("Songs of Life and Hope"), published in 1905, and usually considered Darío's most representative work, deals with broader and more universal themes than his earlier writings.

The long unrealized desire of the Cubans for liberty furnished themes to the poets of Cuba. Often the language was veiled for safety's sake; but the desire for freedom, expressed in one way or another, was the favorite burden of Cuban verse. The emotional fervor roused by the thought of *Cuba libre* helped to produce in the island its unusual proportion of excellent poets. Among these were José María Heredia, Juan Clemente Zenea, José Martí, and Gertrudis Gómez de Avellaneda.

The ablest of these was Heredia (1803–1839), who passed most of his brief adult years in exile because of taking part in a plot against the Spanish authorities in 1823. Two years were spent in the United States, five in Venezuela, and fourteen in Mexico. He was unhappy in the United States, for he found English difficult to learn, and the icy blasts of the northern winter made him long for sunnier climes; but he loved Niagara Falls, and wrote what is commonly considered the best poetical tribute to that cataract. Another of his finest productions also deals with the wild forces of nature, which inspired him to his best. This is "En una Tempestad" (In a Hurricane), written when Heredia was but nineteen years of age. A still earlier poem is an ode composed in 1820 on the "Teocalli de Cholula" (The Aztec Temple of Cholula). These and various other verses by the same poet are in the meter known in Spanish as *silva*, from the free, irregular character of accents and rimes—like trees in the forest. Among Heredia's various patriotic poems one of the best is the "Himno del Desterrado" (Hymn of the Exile).

The leading Cuban revolutionary poet of the middle of the nineteenth century was Juan Clemente Zenea (1832–1871), who, in peril because of his incendiary writings, at the age of twenty took refuge with the Cuban junta in New York City. Here his writings became more seditious, and in 1853 the Spanish authorities decreed his death, if captured; but in 1855 a general amnesty was proclaimed, and Zenea returned to Cuba. His first volume of poems, *Cantos de la Tarde* ("Evening Songs"), appeared in 1860 and received high praise for its fine lyrical qualities. The author at once became very popular, partly because the opening selection, "Fidelia," was taken by the patriotic Cubans to be an allegorical representation of the island suffering under the heel of Spain. After the outbreak of the Ten Years' War in 1868, Zenea became editor of *La Revolución* in New York. Two years later he undertook to carry to Cuba a message for Céspedes, the revolutionary president, under safe conduct from the Spanish minister at Washington. When he was about to return to the United States he was captured by Spanish officials and imprisoned, and in August, 1871, in defiance of orders from Madrid for his release, he was executed by local authorities in Cuba. After his death some of his later verses, *En Días de Esclavitud* ("In Days of Slavery"), were published in New York, and a collection of poems composed in prison came out in Madrid. These added much to Zenea's fame, and stimulated the revolutionary spirit as well.

More of a literary firebrand than Zenea was José Martí (1853–1895), already mentioned as a revolutionary leader. His exile began early and was spent largely in the United States as a member of the Cuban junta in New York. He earned a living by working in various Spanish-American consulates and by writing for the press. In the earlier years he published two small volumes of poems having considerable charm, but his outstanding reputation came from his revolutionary articles and speeches which appeared in various newspapers. These not only show unusual depth of thought but also a style of remarkable clarity and beauty.

Gertrudis Gómez de Avellaneda (1814–1873), unlike the three Cuban poets who have been considered, had no interest in the revolutionary movement and spent most of her life in Spain;

she was twenty-two when she went there with her mother to live. Three years later (1839) her first volume of poems appeared and was well received. After this she wrote various novels and tales and a number of superior dramas, which were very successfully produced on the Spanish stage. Her verse was considered better than her prose, and her poetical dramas were superior to her lyric poems. The influence of Byron is evident in her writings, and so is the classical tradition; but she was no slave to either. Her plays showed decided strength and originality. Her greatest drama is *Baltazar,* which deals with Belshazzar's feast; but *Saul* and *Alfonso Munio* also have merit.

To an unusual degree the literature of Mexico reflects sadness and suffering, especially the writings of the romantic period. The romantic movement was begun in Mexico by Ignacio Rodríguez Galván (1816–1842) through his publication in 1838 of *Múñoz, Visitator de México,* a drama dealing with the reign of Philip II. This, like most of his later productions—legends, short stories, lyrics, and poetical dramas—deals with the conquest and the colonial régime and is tragic in character. Rodríguez Galván's verse was notable for its unusual musical quality. His best poem was probably "La Profecía de Gautemoc," which predicts that Aztec sufferings will be avenged by later invasions of Mexico.

Two eminent Mexican poets of the later romantic period were José Othón (1858–1906) and Manuel Gutiérrez Nájera (1859–1895), both of whom display melancholy in their verses, but combined with fine restraint. Othón expressed himself much in sonnets, which he arranged in sequential order to express the varying moods of nature. One of the best known of these sequences is "Noche Rústica de Walpurgis: Sinfonia Dramática," a description of the succession of sights and sounds he experienced during the passing of the night. Gutiérrez Nájera, a great favorite with Mexicans, who love sad literature, is more melancholy than Othón and also more musical. His later poems show increased lightness and grace of touch, thus foreshadowing the modernist epoch. Two of his best contributions are "Non Omnis

Moriar" and "Para Entonces" (Until Then). Both are religious in sentiment, and the latter is a beautiful elegy. Gutiérrez Nájera, joint founder of *La Revista Azul* (The Blue Review), also wrote clear, graceful, and vigorous prose.

Among important Mexican modernists should be listed Enrique González Martínez, who was born in Guadalajara in 1871. He studied medicine, which he practiced for fifteen years in Sinaloa; but during moments of leisure he wrote and published. At the age of forty he moved to Mexico City and became deeply engaged in educational and literary work. His poems are less pictorial than those of some other modernists but are more thoughtful, and reflect a pantheistic, contemplative love of nature. His pantheism, however, as Isaac Goldberg puts it, was "as much wonder as worship."[1] In his sonnet "The Poets, Tomorrow" he presents another phase of his mind by cheerfully epitomizing the futile repetitiousness of making verse. Still other poems, including some of his finest, have a healing touch like the strong, gentle hands of an understanding physician.

Far more influential than González Martínez was Amado Nervo (1870–1919), Mexico's greatest modernist. A native of the city of Tepic, in the state of Nayarit, Nervo was trained for the priesthood, but soon abandoned that career, partly because of religious doubt. As a small child he wrote verses, and early came under the stimulating influence of Rubén Darío, writing, he says, as he pleased, his only school being "eternal sincerity." Most of his verses are simple, sweet, tender, and strong, and they often breathe a majestic faith in life and humanity. His most influential poem was doubtless "Epitalamio," addressed to Alfonso XIII of Spain in 1906. In it Nervo indicated that the eighteen Spanish-American republics were, in a sense, subjects of the king—in spirit. The "Epitalamio" unquestionably gave to the modernist movement a pan-Spanish turn. Of more general appeal were such poems as "Pájaro Milagroso" (Miraculous Bird), written in 1910 after the author had flown in an airplane, which he compares to a great white bird. From this experience in the sky the poet, who was tired of life, now desires more life. "Let us live!" he cries, "and let not the nations stain the celestial bird with missions of war, for it was born as a messenger of friendship."

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[1] *Studies in Spanish-American Literature*, p. 84.

Of Mexico's numerous novelists three especially worthy of mention are Justo Sierra (1814–1861), Rafael Delgado (1853–1914), and Federico Gamboa (1864–). Sierra, a scholarly lawyer connected with the government of Yucatán, wrote two novels of note: *Un Año en el Hospital de San Lázaro* ("A Year in the San Lázaro Hospital"), published serially in 1841 in the state's first literary journal, and *La Hija del Judío* ("The Jew's Daughter"). Delgado, who also wrote dramas and sketches, at first followed romantic traditions, but later he developed naturalistic tendencies. His *Angelina*, an idyll of love apparently somewhat autobiographical, follows early literary models; *Calandria,* which deals with life among the lowly, is one of the best of his later productions and has been especially praised for its faithful description of manners. Gamboa from the first followed French naturalistic ideals in his writing. He acquired an almost uncanny knowledge of human nature, perhaps through varied diplomatic experience and as foreign secretary of President Victoriano Huerta, and consequently was called a "dissector of souls." The dissection is apparent in his writing. His *Suprema Ley* ("Supreme Law"), which describes the tragic history of a middle-class Mexican family, is considered his best work.

Venezuela's national literature is extensive and varied, and some of it is excellent in quality. At first classical models were followed, but the best Venezuelan writers of this school did their work outside their native land.[1] The romantic movement was introduced by men more definitely identified with the country. The most influential of these, and the pioneer, was José Antonio Maitín (1804–1874), who came into touch with the English romantic poets through being connected with the Venezuelan legation in London from 1824 to 1826. His poems possess genuine lyrical qualities, but also an excess of emotionalism and of ornamentation. These latter characteristics, found also in Brazilian literature, exist in the works of various Venezuelan romantic writers and may have been produced by the heavy tropical climate and the marked strain of Negro blood in the nation.

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[1] Andrés Bello, it will be recalled, was a Venezuelan, but he did most of his writing in England and in Chile, and will be considered in connection with the literature of the latter.

More restrained and artistic were the poetical works of Juan Antonio Pérez Bonalde (1846–1892), who was much under the influence of German writers, especially Heine, many of whose poems he translated, and published in 1877 under the title *Estrofas*. Pérez Bonalde also made an admirable translation of Poe's "Raven." But he deserved and won more renown by his own poetical writings, the most famous being his "Poema del Niagara," written in 1880. It is an artistic and philosophical masterpiece with a majestic sweep, and vies with Heredia's poem on the same subject. Some of his other poems also show rare beauty of sound, color, and sentiment, as the following stanzas from "Vuelta a la Patria" (Return to my Country) prove:

> Ese cielo, ese mar, esos cocales,
> ese monte, que dora
> el sol de las regiones tropicales
> —¡luz! ¡luz, al fin!—, los reconozco ahora:
>
> son ellos; son los mismos de mi infancia.
> Y esas playas que, al sol del mediodía,
> brillan a la distancia
> —¡oh, inefable alegría!—
> son las riberas de la patria mía.[1]

Venezuela is more famed for her writers of prose, however, than for her poets. Among the former are a number of outstanding novelists, José Gil Fortoul being one of the earliest. His novels were psychological studies resulting from discussion caused by the teaching of the Darwinian theory in the University of Caracas. Both his *Julián*, which is autobiographical, and his *¿Idilio?* treat of the ancient conflict between science and theology. Besides his novels Gil Fortoul wrote a scholarly *Historia constitucional de Venezuela.*

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[1] That sky, that sea, those coconut trees, that mountain gilded by the tropical sun—light! light at last!—I recognize them now. They are they; they are those of my infancy. And those strands, which gleam in the distance under the midday sun—oh, ineffable joy!—they are the shores of my native land.

The poem is published in the *Florilegio del Parnaso Americano*, by Michael A. de Vitis, pp. 570–572.

Manuel Romero García pioneered in another direction—the portrayal of rural social life in Venezuela in the days of Guzmán Blanco. This called for the handling of local dialect. He was successful; and his *Peonía* (published in 1890) caused the *criollo*, or nationalistic, novel to become a type in the country's literature. García's work as a criollo novelist was excelled by various writers, of whom Gonzalo Picón Febres (1860–   ) is regarded as the ablest. The best of his works is *El Sargento Felipe*, a very realistic and tragic story of the disasters which befell a family whose head was conscripted into Guzmán Blanco's armies. Another writer of the period, Manuel Díaz Rodríguez, was especially noted for the grace and beauty of his style. He showed greater versatility than García and is famed for literary criticisms as well as for novels. One of the best of the novels is *Ídolos Rotos* ("Broken Idols"), which deals with the blighting effect of the contemporary political system of Venezuela.

The most famed and influential of Venezuela's modernists, and one of the half-dozen greatest recent Latin-American writers, is Rufino Blanco Fombona, born in Caracas in 1874. He has written in both meter and prose, but much of his prose is marked by poetical beauty. In all his writing Blanco Fombona is almost arrogantly fearless and independent in thought and form. *Cantos de la Prisión y del Destierro* ("Songs of Prison and of Exile"), published in 1911, are his own favorites among his poetical works. Some of the finest selections in the volume were composed in a Venezuelan dungeon while Blanco Fombona was a political prisoner. The writer's conception of life as a struggle between the forces of good and of evil, with the evil often triumphant, is revealed in his two novels, *El Hombre de Hierro* ("The Man of Iron") and *El Hombre de Oro* ("The Man of Gold"). In the view of some these are his greatest writings, but he has created more attention as a critic of the existing order. His exquisitely formed diatribes against the United States, which is his pet aversion, are especially bitter. Many of his most interesting opinions upon things as they are were published in the miscellaneous collection *La Lámpara de Aladino* ("Aladdin's Lamp"), which appeared in 1915.

Though Venezuela won the greater fame through her prose writers and Colombia through her able poets, it was from Venezuela that the romantic ideals reached the Colombian writers, who adopted them with an understanding spirit. Three of the greatest of Colombia's poets are José Eusebio Caro (1817–1853), Julio Arboleda (1817–1862), and Gregório Gutiérrez González (1826–1872). Caro was a man of deep feeling, whose soul, says Menéndez y Pelayo, "was a volcano which in a short time was bound to consume him."[1] He reached unusual heights of spiritual exaltation, and his lyrical qualities, expressed in varied meter, were a part of his very being. Among Latin-American poets he was unique in his emphasis upon character. In this he is a kindred spirit with Anglo-American poets of the New England school; in fact, he has been called the "Puritan of South American literature."[2] No poseur he; what he wrote he felt. Two of his best poems are "El Bautismo" (The Baptism), addressed to his newly born son, and "En Boca del Ultimo Inca," words put in the mouth of the last Inca.

Julio Arboleda, in contrast to Caro, was no moral or religious teacher, but used much of his energy in political struggles on the side of the Liberals and followed political themes in much of his writing. Like many another Latin-American poet, he spent some time in political imprisonment and in exile; and he finally died by an assassin's hand. Two of his best poems are "Estoy en la Cárcel" (I am in Prison) and "Al Congreso Granadino" (To the Granadine Congress); but his most ambitious writing was an unfinished epic, "Gonzalo de Oyón," dealing with a legend of the period of conquest. The sublime beauty of Colombia's landscape is portrayed in many of Arboleda's verses, and in the epic just referred to he describes the charming valley of the Cauca, at the end of which is "that Eden green and smiling, the illustrious Popayán"—where lay his home.

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[1] *Historia de la Poesía Hispano-Americana*, Vol. II, p. 47.

[2] Alfred Coester, *The Literary History of Spanish America*, p. 275.

Gregório Gutiérrez González, a native of Antioquia, to which nature had not been as prodigal as to Cauca, was also influenced by home environment, both in use of local dialectic expressions and in choice of subject. His greatest poem, "Sobre el Cultivo del Maíz en Antioquia" (1866), is, in fact, an agricultural epic descriptive of the labor involved in planting maize in his native province. But the varied themes of his writings showed him to have wide interests. One of his best poems is "¿Por qué no canto?" (Why not sing?) Another describes the falls of Tequendama, near Bogotá. This cataract, though less copious than Niagara, is four times as high, and its beauty has inspired many a poem, the best of which is perhaps that of Agripina Montes del Valle, one of several Colombian women who have written good verse.

Two of Colombia's novelists—Eugenio Díaz (1804–1865) and Jorge Isaacs (1837–1895)—may be mentioned here. Alfred Coester considers Díaz the most realistic of Colombian novelists and writers on manners. As a small farmer Díaz learned to observe carefully and to note details, and he put this knowledge to use in his longest and most masterly work, *Manuela*. The novel is centered round a small provision store kept by the heroine, Manuela, and faithfully portrays the various types that come and go. Isaacs, in contrast to Díaz, was a thorough romanticist, as is shown by his novel *María*, on which his fame rests. The work is an idyll of love laid in the Cauca valley, where Isaacs spent his childhood, and is exceedingly sentimental; but it gives faithful descriptions of local manners and customs and is filled with vivid word pictures of the beautiful natural scenery of the region.

In José Joaquín Olmedo (1780–1847) the little state of Ecuador gave to the New World one of its greatest poets. Olmedo was trained in the classical school of his day, and all his writings reflected its traditions. His poems are noted for their great artistic beauty and their unusual lyricism. He had published a few poems before the wars for independence began, but his more mature writings excelled these. The greatest of his works is the silva "La Victoria de Junín," written in 1824 to celebrate the victory of the armies of Bolívar over the royalist forces in Peru. Another charming production of the poet is his "Silva a un Amigo en el Nacimiento de su Primogénito" (To a Friend upon the Birth of his First Child).

Two other Ecuadorean writers of prominence, though far inferior to Olmedo, are Juan León Mera (1832–1899) and Numa Pompilio Llona (1832–1907), both of whom were romantics. Mera was a man with varied literary and other interests, but his best writing was in his poems and novels, many of which dealt with the aborigines. His poetic romance *La Virgen del Sol* ("The Virgin of the Sun") concerns the period of the conquest and is given a unique and convincing note through the introduction of parts modeled after the songs of the local Indians. Perhaps an abler work is the prose novel *Cumandá, o un Drama entre Salvajes* ("Cumandá, or a Drama among Savages"), a tragic account of a beautiful young Spanish girl kidnaped in childhood by aborigines. Llona is chiefly noted for his long philosophical poems, among them *Los Caballeros del Apocalipsis* ("The Horsemen of the Apocalypse"), resulting from seeing a painting of the subject in Paris, and *La Odisea del Alma* ("The Odyssey of the Soul"), a subjective, autobiographical poem of majestic movement addressed to the poet's mother.

The literature of Peru, unlike that of the other Latin-American countries, is on the whole without the melancholy note; it is cheerful and happy and at times merry to even a rollicking degree. The contrast is perhaps to be explained by the predominance of light-hearted Andalusians among the European settlers in the colony, which in the educated class overwhelmed the aboriginal strain tending to sadness.

The earliest noted writer of the national era was Felipe Pardo y Aliaga (1806–1868), whose son, Manuel, was later president of Peru. Pardo, of aristocratic blood and well educated in

Spain, devoted himself, with didactic intent, to producing witty pen pictures of his compatriots which showed up the social and other shortcomings of which they were provincially unaware. *Frutas de la Educación*, published in 1828, was the first of three comedies which poked ironical fun at national manners, including the excessive imitation of the French in some quarters and the insistence of the women in others upon wearing the manto with but one eye exposed. Considerably later Pardo, as a member of the Conservative party, attacked the Liberals with his clever pen through a paper which he founded called *Espejo de mi Tierra* (Mirror of my Country). In it he even parodied the constitution drawn up by his opponents.

One of the most determined to get fun out of life was Peru's most original writer, Ricardo Palma (1833–1919), who introduced into literature the historical anecdote, or tradition, which won him vast popularity. In all he wrote nine volumes of *Tradiciones*, made up of choice bits gleaned from the colonial chronicles of Peru and portraying all types of the population, with special preference for humorous incidents. Though Palma had many imitators, none approached in charm and tone his own tradiciones.

Another merry-hearted major writer of Peru was Pedro Paz Soldán y Unanue (1839–1895), one of the country's greatest poets and a leading one of South America. Under the pen name Juan de Arona he wrote, with much wit and humor tucked in, detailed poetical descriptions of homely, everyday events connected with farm life in the region of his birthplace, and of the colorful scenery. These writings, published in 1867 under the title *Cuadros y Episodios peruanos*, are Paz Soldán's best.

After the first generation of independence Peruvian literature began to lose some of the earlier merry note and to take on a more serious tone—perhaps partly through a stronger assertion of aboriginal blood and a realization of national political and social demoralization; but the War of the Pacific, which terminated so tragically for Peru, was doubtless more influential in lending gravity to national literature. One of the later writers to be strongly moved by the country's social ills was Clorinda

Matto de Turner, who in her novel *Aves sin Nido* ("Birds without Nests") called attention to the oppressed condition of the Peruvian aborigines. Like Harriet Beecher Stowe's *Uncle Tom's Cabin*, the book won fame less for literary merit than for graphic indictment of a great wrong. Of more artistic merit were the realistic novels of Mercedes Babello de Carbonero, who in *Las Consecuencias* painted the evil results of gambling and in *El Conspirador* set forth the demoralization coming from revolution. Her *Blanca Sol*, didactic in a different way, treats of a crude, ignorant, socially ambitious society woman.

The leading modernist writer of Peru is the poet José Santos Chocano (1875–   ), a man less Spanish and more cosmopolitan in his outlook than many of his Spanish-American fellow writers and—reflecting the attitude of his country—more friendly toward the United States. Radical in his views and of deep feeling, he writes with great intensity and even extravagance. Some of his most emotional works have been inspired by imprisonment for revolutionary activities. His writings have been numerous and varied. Two of his best poems, interesting because of their admiration for the United States and their pan-American spirit, are "Istmo de Panamá" and "El Canto del Porvenir" (Song of the Future). Perhaps his poetical descriptions of typical Spanish-American cities best show his ability to pick out with journalistic instinct interesting essentials and to clothe them with vivid and beautiful language.

Another contemporary Peruvian writer deserving mention is Francisco García Calderón, author of histories and political essays in prose. His outstanding volumes are *Hombres e Ideas de nuestro Tiempo*, *Profesores de Idealismo*, *Le Pérou contemporain*, and *Démocraties latines de l'Amérique*. These are written in a graceful, vivid style and, though not very dependable for statements of fact, are valuable for their brilliant analysis of historical events and public characters.

In view of the smallness of its population Uruguay has made an unusually large literary contribution in both prose and verse. This is perhaps partly the result of its stirring history as a buffer state. Constant danger from foreign foes is more of an inspiration to imaginative literature than mere humdrum domestic insurrections. Hence Juan Carlos Gómez (1820–1884), considered the best poet of the Uruguayan romantic era, in one of his ablest poems, "Figueredo," wrote with deep resentment of Brazil's meddling in Uruguay's politics. But Gómez in turn inspired indignant protests from other writers by advocating annexation to Argentina.

More important was Alejandro Magariños Cervantes (1825–1893), whose works were marked by vivid local color and deep patriotic sentiment. He published two volumes of poems, *Brisas del Plata* ("Breezes of the Plata") and *Palmas y Ombúes* ("Palms and Ombús"), and also *Caramurú*, a gaucho romance in prose; but he won the most praise by *Celiar*, a poetic legend dealing with Indian, creole, and Spanish relations in the eighteenth century. This was quite outdone, however, by a writer of the next generation, Juan Zorilla de San Martín (1857–), who, in his long poem, *Tabaré*, produced what is generally conceded to be Uruguay's poetic masterpiece. Like the *Celiar*, it is concerned with the aborigines, and describes the tragic love of a halfbreed Charrúa Indian for a Spanish maid of high degree. The colorful, lyrical lines throb with feeling.

Uruguay's greatest prose novelist is Eduardo Acevedo Díaz (1851–), who, while living in exile in Buenos Aires, wrote his first work, *Brenda*, a cheerful romance, which won him fame. He added to it by a series of three novels, partly historical in plots, dealing with the career of a family in the Uruguayan wars for independence. As usual, gauchos and Charrúa Indians play a part in the story.

The ablest of the realistic novelists is Carlos Reyles, who portrayed the sordid side of life with grim fidelity. His first novel, *Beba*, which is probably his best, was published in 1894. Most of the tragic events which it portrays took place in a scientifically cultivated Uruguayan estancia.

The most famous and most influential modernist of Uruguay, and one of the outstanding writers of South America, is José Enrique Rodó (1872–1917), a man of liberal spirit and brilliant mind who won fame by his philosophical essays. He was a native of Montevideo, where he was educated. After spending some years as teacher of literature in the university there, he began writing for the press on political questions. One of his most famous contributions in this field, called "Liberalism y Jacobinism," displays a broad tolerance in a politico-religious controversy. Following the lead of Nervo, Rodó showed a marked desire for closer relations between Spain and her former colonies, an attitude especially strong in the collection of essays entitled *El Mirador de Prospero* ("From Prospero's Observation Tower"). He admired the material civilization of the United States, but thought the American people rather empty of ideals. Hence in *Ariel*, a special message to Uruguayan youth, he urged that attention be given to the practical and material, but stressed the importance of dominance by the spiritual. Like Blanco Fombona, he distrusted the "imperialism" of the United States, and against it uttered warnings in various writings.

The imaginative literature of Argentina, like that of Uruguay. treats of gauchos, Indians, and politics—the tyrant Rosas being the subject of many Argentine works. The romantic style was introduced by Esteban Echeverría (1805–1851), who was much influenced by Lord Byron; but he used American themes and did much toward making them popular. A collection of Echeverría's poems, entitled *Los Consuelos*, published in the early eighteen-thirties, attracted prompt attention, and others followed. His most famous single poem is a long one, "La Cautiva" (The Captive), appearing in 1837 in a volume called *Las Rimas*. It is the tragic story of a white woman captured by Indians on the Argentine pampa.

A more influential poem than "La Cautiva," but, like it, dealing with gauchos and Indians, was "La Vuelta de Martín Fierro" (The Return of Martin Fierro), by José Hernández (1834–1886). Through showing how a gaucho family was wrecked by the military conscription of the father, it roused sympathy for the gaucho and made him fashionable in literature and on the stage.

A contemporary of Hernández was Olegario Víctor Andrade (1838–1883), author of ringing, oratorical verses of patriotic theme which made him very popular. Though some of the glitter of his lines is caused by tinsel, the writings are sincere in spirit and decidedly musical. Perhaps the best of his poems is "El Nido de Condores" (The Condor's Nest), which describes the battles fought by San Martín in liberating Chile.

Of a different type from these writers was Carlos Guido y Spano (1827–1918), a conservative who remained true to the classical poetical tradition. His writings, which reflected his character, were noted for unusual thoughtfulness and a strong sense of justice, as well as for artistic qualities. Two of his greatest poems, "México: Canto Épico" (Mexico: an Epic Song) and "Nenia,"—the one treating of the French invasion of Mexico and the other, of the Paraguayan War,—are indictments of what the author felt to be unrighteous proceedings. "Nenia" has peculiar interest as illustrating the incorporation of native words with the Castilian. Several names from the Guaraní tongue appear in the poem, the title itself, meaning "funeral dirge," being an example. "Nenia," which is filled with sobbing sadness, is the lament of a Paraguayan girl, sung in Guaraní to the accompaniment of a harp, over the loss of her parents, brothers, and sweetheart in the blighting war with the triple alliance. The rare musical qualities of the poem may be seen from the following stanza, which appears as a refrain:

> ¡Llora, llora, urutaú,
> en las ramas del yatay;
> ya no existe más el Paraguay,
> donde nací, como tú!
> ¡Llora, llora, urutaú![1]

Of Argentina's various able novelists two only will be mentioned: José Marmol (1818–1881) and Carlos María Ocantos

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[1] Weep, weep, urutaú [Guaraní name for a form of owl with a sweet, wailing voice], in the branches of the yatay [Guaraní name for a type of palm tree growing in Paraguay]; no more exists Paraguay, where I was born, like you! Weep, weep, urutaú!

The complete poem is printed in the anthology by Michael A. de Vitis entitled *Florilegio del Parnaso Americano*, pp. 30–31.

(1860–). The former, imprisoned and later exiled by Rosas, turned his experience to account by writing *Amalia*, the most vivid and comprehensive indictment of the tyrant in novel form and probably the most widely read. Ocantos is considered Argentina's ablest novelist, however. Most of his numerous works deal with fashionable society in Buenos Aires, and are very realistic in style. His first novel, *León Saldívar*, was published in 1888. *Don Perfecto*, which appeared in 1902, is written in the form of an autobiography and is one of a series concerned with the joys and sorrows of the same family.

Some of Argentina's statesmen of first rank were eminent writers. The importance of Alberdi's *Bases y Puntos de Partida para la Organización Política de la República Argentina* has been indicated. Domingo Faustino Sarmiento wrote many volumes upon political and other questions, the best known perhaps being *Facundo, o la Civilización y la Barbarie*, which is concerned primarily with the career of Facundo Quiroga, one of Rosas's caudillos; but it likewise gives the writer's views on political matters and presents interesting descriptions of Argentine life in town and country. Bartolomé Mitre was the most literary of the Argentine statesmen and showed much versatility as a writer. In his early years he composed lyrical poems of considerable charm; later he contributed extensively on public questions to the columns of *La Nación*, of which he was the founder; and he also wrote biographies of Manuel Belgrano and José San Martín, the former being published in 1858 and the latter thirty years later. The life of San Martín is considered Mitre's greatest literary work.

The first eminent writer of Chile's national period, and the greatest of the country in the field of belles-lettres, was her adopted son, Andrés Bello (1781–1865). Though Bello was forty-eight years old when he arrived in Chile, he had his most productive years before him. His was a versatile pen. Its products included a number of poems, political articles for *El Araucano*, admirable textbooks on Spanish grammar, international law, and other subjects for his students, and also various poems. His fame is greatest as a poet. Bello was primarily a classicist, but he was influenced in later years by romantic writers, especially by Victor Hugo. During his long residence in England he published many of his best verses in literary reviews of which he was part owner. Among these writings were two silvas: "Alocución a la Poesía" (Allocution to Poetry) and "Silva a la Agricultura de la Zona Tórrida." The latter, which is the finer, shows Virgilian influence. It sets forth with exquisite, restrained artistry the exuberant beauty of tropical nature and urges the inhabitants of the torrid zone to cease wasting their energy in devastating wars, to learn to honor labor and the simple life, and to settle down to cultivation of their fields. Another poem, perhaps as great a favorite as the silva just referred to, was "La Oración por Todos" (Prayer for All), published in 1843. It is an adaptation of Victor Hugo's "La Prière pour tous," and is thought by many to be an improvement on the latter.

Though in his writing of poetry Bello borrowed and imitated, he wrought his borrowings with the touch of a genius into an artistic work of his own. Other verse-writers of his adopted country were not so successful. The poetry of Chile—perhaps because Chileans are less sentimental and emotional and more practical than their neighbors—is more forced and less original than that of other Latin-American countries. This is especially true of poetical compositions after the classical model, which was rather dominant until the second half of the century, partly owing to Bello's influence. Some of the romantic poets, especially José Antonio Soffia, who secured inspiration in Colombia through residence there as Chilean ambassador, showed more flexibility and originality. The majestic scenery viewed by him on his trip up the Magdalena River to Bogotá is described with genuine grace in some of his poems. *Bolívar y San Martín*, a poetical romance written in Colombia's capital, is perhaps his best work.

Chile's prose-writers rank higher than her poets, exclusive of Bello. Among the former are some able novelists, of whom Alberto Blest Gana (1831–1920) is usually considered the ablest. Blest Gana at first aspired to be a poet, but he was self-critical enough to know that his verses were only mediocre. Despairing of ever doing better, he burned them and turned to writing prose fiction. One of his earliest efforts in this field, *La Aritmética y el Amor* ("Arithmetic and Love"), won a prize offered in 1860 by the University of Chile. During the next half-century other novels by Blest Gana followed. Most of them dealt with weaknesses in Chilean society. *Martín Rivas* (1862), which faithfully describes scheming, ambitious social climbers of Santiago, is the writer's masterpiece. Daniel Barros Grez (1839–), unlike Blest Gana, turned to Chile's past for material, and is the country's best writer of historical fiction. His ablest work is *Pipiolos y Pelucones*, with a plot laid in the time of Portales.

It is in the field of fact rather than fiction that Chile has made her most distinguished literary contribution. The country has produced historians of decided merit. One of these was Benjamín Vicuña Mackenna (1831–1886), also remembered for his efficiency as mayor of Santiago. His graceful style and vivid descriptions make Chile's past live for his readers. He investigated and wrote upon practically every aspect of his country's history. The several score volumes from his pen included also a number of biographies, one of them treating of Diego Portales. More scholarly in method than Vicuña Mackenna was Diego Barros Arana (1830–1907), likewise a specialist in his country's history, whose greatest work is his *Historia Jeneral de Chile*, in sixteen large volumes which were issued between 1884 and 1902. Another writer of the same general school as Barros Arana was Miguel Luis Amunátegui (1828–1888), noted especially for his biographies, including a life of Andrés Bello. More unusual is José Toribio Medina, born in 1852, two thirds of a generation after the others. Señor Medina is a distinguished historian, and as a bibliographer he is without a peer in the Western Hemisphere. His field of study is Spanish America, in connection with which he has written, compiled, or edited about two hundred pamphlets or volumes, and has printed and bound many of them in a shop set up in his home in Santiago.

Literature and Art in Hispanic America

BRAZILIAN LITERATURE

Many Brazilians have occupied themselves with writing, but a large fraction of them have been mere dilettantes; in consequence the net product of real literature has been small. In view of the climatic handicap of practically the whole country, this is not to be wondered at, for serious, sustained intellectual effort is very difficult in a subtropical or tropical atmosphere; hence Isaac Goldberg rightly calls Brazil's meager literary achievement a triumph of mind over matter. The first notable writings of the national period were poems and novels showing French romantic influence. These and, indeed, much of the whole imaginative literature of the country, are characterized by melancholy and wistful longing, known in Portuguese as *saudade.* In most cases the sadness was probably genuine, for many of the writers were adolescent youths whose lives were brief and were dominated by intense and turbulent emotionalism.

Gonçalves de Magalhães, the first prominent Brazilian romanticist, was an exception to what has just been said; he lived to pass three score and ten, and his writings were noted for unusual serenity. They were marked by a triumphant religious faith and an exaltation of the divine; Magalhães worshiped in his verse. Born in 1811, he published his first work, *Poesías* (in which he followed Portuguese classical standards), when he was twenty-one years of age. In the next year (1833), as a result of a trip to Europe, he became a thorough romanticist, a fact he announced in 1836 in a new volume entitled *Suspiros Poeticos e Saudades* ("Poetic Sighs and Longings"). These and later writings show deep, introspective thought, love of country, and belief in a universe ordered and directed by a kind and just God. One of his longest poems, an epic in ten cantos, *A Confederação dos Tamoyos* ("The Confederation of the Tamoyos"), treats of relations between the Indians, Jesuits, and Portuguese. The writer idealizes the aborigines, condemns the Portuguese for exploiting them, and praises the missionaries for their devotion to duty.

Gonçalves Dias, who was born later than Magalhães and died earlier (1823–1864), was more famous than he; by some he is considered Brazil's greatest poet. The fact that in his veins flowed aboriginal and Negro blood as well as Portuguese helped to develop in him an intense Brazilianism and gave him greater interest in the darker races, about both of which he wrote. In his *Poesías Americanas* he, like Magalhães, idealized the aborigines and helped to give early importance to the characteristic of Brazilian literature known as "Indianism." His poems are unusually lyrical, and in them he sang much of the natural charms of his country, glorified by patriotic love. The first of such poems was his "Canção de Exilio" (Song of Exile), written while he was on a visit to Portugal. In it he declares that the birds of Portugal do not warble as does the *sabiá* singing in the graceful palm trees of his homeland. The canção was set to music and became a favorite song of the nation, and its author became the best-loved poet of Brazil. Thereafter other writers of verse saw their country with new eyes and sang much of its beauties.

Another who wrote lyrical homesick lines upon the natural charms of Brazil—of mango trees and palms, flitting butterflies, waterfalls, and tropical nights—was Casimiro de Abreu, who died in 1860, aged twenty-one. In his "Os Lusíadas" and other poems, written in a foreign land, the love and wistful longing expressed for childhood home and country made him Brazil's finest singer of saudades.

Of a different type was Castro Alves (1847–1871), who wrote strong, tender lines in behalf of social justice. His "O Poema dos Escravos" (The Poem of the Slaves) is really an organized series of poems denouncing in sweeping, oratorical manner Negro servitude. The collection was not complete when Alves's short life ended; but two or three of the poems—in particular, "Vozes d'Africa" (Voices of Africa) and "O Navio Negreiro" (The Slave Ship)—helped to spread sentiment in favor of abolition as truly as did Whittier's *Songs of Slavery* in the United States.

Two novelists of this romantic period deserve mention: José de Alencar (1829–1877) and Alfredo de Escragnolle Taunay

(1843–1899). The former, Brazil's most noted Indianist in prose, is known by his *Guarany* and *Iracema*. The *Guarany*, converted into an opera by Carlos Gómes, Brazil's most famous musical composer, was produced in most of the capitals of Europe. The Indians of Alencar show considerable naturalness, the plots of the stories are simple, and the descriptions are so beautiful as to justify his being called a poet in prose. Taunay, descendant of a noble and talented French family, was far more original than Alencar. Though his writings are varied and numerous, his reputation rests chiefly upon the romance *Innocencia*, which in 1900 was called by the Argentine writer Martín García Mérou the "best novel written in South America by a South American."[1] The scene of the story is laid in the sertões of remote Matto Grosso, with which the author became familiar during the period of the Paraguayan War, and he describes it with almost scientific care. The heroine is Innocencia, a miner's daughter, who is desirous of marrying an itinerant physician instead of the mule-driver whom her father has chosen for her.

The writers of the modernist period, which began in Brazil about 1870, displayed more distinctly national characteristics than did the romanticists, and also extreme individualism. One of its best representatives was Joaquim María Machado de Assis (1839–1908), who worked in both prose and verse, but is best known for his prose writings. Many were his novels and tales, and in all of them he showed that he made and executed his own literary laws and standards. His style is polished and his language is unusually pure, moderate, and restrained. "This son of the tropics," wrote García Mérou, "is cold, tranquil like an Anglo-Saxon."[2] Most of his writings show a persistent ironic pessimism and also a spontaneous humor, which reminds García Mérou of Sterne. *Yaya García* and *Memorias Posthumas de Braz Cubas* are two of the most noted of his novels. Machado de Assis was long considered the most distinguished of Brazilian writers, and on the founding of the Brazilian Academy of Letters in 1897 he was made its president, and held the position until his death.

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[1] *El Brazil Intelectual: Impresiones y Notas Literarias*, p. 166.

[2] Ibid. p. 418.

More original was the work of Euclydes da Cunha (1866–1909), whose reputation rests upon a single book, *Os Sertões*, published in 1902. Its author, who was trained as a scientist and engineer, secured his knowledge of the sertão and the material for his book through being sent into the wild hinterland of the country as a representative of the newspaper *Estado de São Paulo* to report upon the warfare between Antonio Maciel (a disaffected religious reformer) and his followers and the government troops sent against them. The book, which deals with the conflict, is written with scientific accuracy but poetic vision and gives a true picture of the misunderstood and neglected inhabitants of Brazil's vast sertões as they were in the eighteen-nineties.

Another writer whose reputation rests upon a single book is Graça Aranha, who in his *Chanaan* (Canaan), published in 1902, did for the disillusioned immigrant to Brazil what Cunha did for the dweller on the sertões. The work, which deals with the distressed lives of German settlers in the state of Espírito Santo, also roused Brazilians to an interest in Germany's literature.

A few other Brazilian writers, not primarily in the field of belles-lettres, may be mentioned. Among them are two men who did much toward making the world acquainted with Brazil's literary achievements. The earlier, Silvio Romero, is especially known for his *Historia da Litteratura Brasileira*, which is very wide in its scope and was left uncompleted. José Veríssimo, author of *Estudos de Literatura Brazileira*, is considered by many the best literary critic produced by Brazil. Francisco Adolfo de Varnhagen, who belongs to an earlier generation, was really the father of Brazilian literary criticism; but he is perhaps better known for his *Historia Geral do Brasil*, a standard authority on the period covered. Another historian is Joaquim Nabuco (1849–1910), better known as a statesman and diplomatist and as the author of *O Abolicionism*, a vigorous pamphlet against slavery. His *Um Estadista do Imperio*, dealing with the life and times of his father, is a valuable work on an important period of Brazilian history. Even more versatile was Manoel de Oliveira Lima (1867–1928), a deep lover of his native Brazil, but possessed of world vision. A representative of Brazil at many foreign courts, he wrote much for Brazilians about the countries he came to know; but he is perhaps most distinguished for his scholarly biography, *Dom João VI do Brasil*, and for his published lectures delivered in foreign lands in the interest of throwing light upon Brazilian history. Two of the best-known series of these are *The Evolution of Brazil compared with that of Spanish and Anglo-Saxon America*, given in English at Stanford University, and *Formation historique de la nationalité brésilienne*, presented before the University of Paris.[1]

SPANISH-AMERICAN ART

In accordance with the general rule of national development, the Hispanic-American people as a whole have done but little in the field of art in comparison with their achievements in literature. Literature and oratory, not picture and statue, are the natural vehicles for expressing patriotic fervor stirred by wars for independence or by early national struggles in general. Furthermore, special technical training not needed by the writer is needed by the artist, and such training was not generally supplied. Many of the countries did not establish art schools until near the close of the nineteenth century, and in some they are still lacking. In a number of cases foreign artists—usually coming from Spain, France, or Italy—established themselves in the new countries and through giving lessons fostered artistic development; but more stimulation appears to have been contributed by the art schools established under public authority and by government assistance to promising young men who desired to study abroad.

The early artists of the national period in Hispanic America, like those of Anglo-America, were in their technique at first mere imitators of Europeans. The classical traditions were followed. Later, partly as a result of the romantic movement in literature, painters showed more interest in representing the beauties of native landscapes and handled their brushes with more independence. Then, near the close of the nineteenth century, slightly behind the modernist movement in literature, came modernism in art, running to impressionism, cubism, futurism, and numbers of other types. The change helped to bring about more artistic individuality in the lands which it influenced.

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[1] Dr. Oliveira Lima spent his last years in Washington, D.C., and left to the Catholic University of America in that place his admirable library of Braziliana.

Cuba received marked artistic inspiration during its colonial period through its school of painting and sculpture. This was established in Havana in 1818 under the patronage of the intendant Alejandro Ramírez, and was therefore popularly known as the "Academy of St. Alexander." Its founder and first director was Jean Baptiste Vermay, an able French artist who had studied under David. To his classes the master imparted better principles of technique than had been known in the island before. Students were few, but Cuban painting improved. In 1840 government pensions for studying abroad were first granted. One of the ablest Cuban artists of the second half of the century was Miguel Melero, for a generation the most influential teacher in the school of art. His painting "Colón ante el Congreso de Salamanca" is excellently conceived and attracted wide attention. One of Melero's most distinguished pupils was José Arburu y Morell, who won considerable recognition by his "La Primera Misa en America" (The First Mass in America); but his promising career was cut short by early death. Melero's own son, Miguel Ángelo, also died young after showing artistic gifts. Two of his best canvases were "Cristo Yacente" (Recumbent Christ) and "Cabeza de Cardenal" (Head of a Cardinal).

Cuban artists of the national period built upon the solid foundation laid in the country's long colonial era. The prominent artists of the twentieth century reflect the influence of the modernist school, but in a conservative way. Three of the leading ones are Armando Menocal, Leopoldo Romañach, and Esteban Valderrama. One of Menocal's best works is "La Muerte de Maceo" (The Death of Maceo), which reveals capable handling of the strong tropical light which falls upon the dying general and the military comrades who surround him as he lies in a plain broken by a background of coconut groves. In Romañach's "La Convaleciente" (The Convalescent), representing a mother sitting beside the bed of a young girl, there is artistic intelligence and deep feeling. "Fundamental," a picture by Valderrama, depicts, silhouetted against a light, cloudy sky, a team of four powerful oxen with brawny driver just arriving at the top of an incline.

Mexico, despite its distressed and turbulent political history, has made some contribution to art; but apparently less influence was exercised by its school of art upon national artistic development than came to Cuba through the "Academy of St. Alexander." Nevertheless before the close of the nineteenth century several Mexican painters had won some recognition, most of them through pictures with religious or classical subjects; but Félix Parra gained a name for himself by two large and striking canvases dealing with themes from Mexican history: "Episodio de la Conquista" (Episode of the Conquest), showing Aztec women and children slaughtered in their homes by ruthless Spaniards; and "Fray Bartolomé de Las Casas," representing the Apostle of the Indians standing in the doorway of an Aztec temple beside the body of a slain Indian and uttering a vow to champion the cause of the oppressed aborigines. Some works of Mexican sculpture from this period show merit. Perhaps the best of these is the white marble monument made in 1880 by Juan and Manuel Islas for the tomb of Benito Juárez in the Pantheon of San Fernando in Mexico City. It portrays the dead president reclining with his head in the lap of a weeping woman representing the Mexican nation. More ambitious is the great monument to Cuauhtemoc, the last prince of the Aztecs, which was unveiled in 1887. It stands in one of the *glorietas* of the Paseo de la Reforma in Mexico City. The bronze figure of Cuauhtemoc poised ready to throw a spear was done by Miguel Noreña. The bas-reliefs on the high, elaborate base of the monument—representing the Aztec prince being tortured by the Spaniards to tell where the treasure was hid, and other scenes from Mexican history—were the work of Gabriel Guerra.

Before the close of the century Mexican art had become stereotyped and artificial, but a reform was begun through the *Revista Moderna*, an ultra-modern literary and art review started by Julio Ruelas, a romanticist who had studied in Germany. In the publication he used many illustrations of his own showing imagination, strength, and feeling. The political revolution begun in 1911 by Francisco Madero helped to accelerate the artistic revolution partly through the appointment of Adolfo Best Maugard as director of art-teaching in the public schools. The trend of the new movement was made evident by the fact that the textbook prepared by the director was based upon a study of designs employed by the advanced Mexican aboriginal groups and by the colonial Spaniards. Not only was much attention now given to art in the public schools, but additional special art institutions were started to give adequate opportunity for cultivating the talent of the nation.

Meanwhile a number of new artists were calling the attention of the art world to Mexico. Among these were Saturnino Herrán, noted for the beauty of his colors and the strength of his human figures; José Clemente Orozco, a painter having vision and feeling, who rather specialized on figures of native women; and, most important of all, Diego Rivera, the moving spirit of the new art in Mexico. Rivera, who spent some years in study abroad, was for a time a cubist of importance, but he later turned to impressionism. Under contract from the Obregón government to decorate the walls of the Ministry of Education and the National Preparatory School in Mexico City, he and his colleagues proceeded to cover the extensive surfaces with a pictured drama of the hopes and struggles of the rank and file of the nation. The impressionistic views of laboring, workaday Mexicans, done in strong, simple, and at times brutal lines and deep, swarthy shades, are admired by many. At the Pan-American Art Exhibition of 1925 Rivera was further honored through being awarded the first prize of $1500, offered by the Los Angeles Museum, for his "Día de Flores" (Flower Day).

The central figure is a stocky impressionistic man bearing upon his shoulders a great basket of impressionistic callas. The painting is strikingly effective in its strength.

The modernist sculpture of Mexico also shows determination to develop upon an aboriginal foundation as far as possible. The country's leading sculptor in the new movement, Manuel Centurión, is especially fond of working with Aztec motifs. He has done some good friezes and also a powerful figure of an Aztec emperor.

Though the art academy of Venezuela, established by the Sociedad de Amigos del País, did not come into existence until near the close of the nineteenth century, the country has produced some distinguished artists. One of these is J. Rojas. His "Dante en Paraíso," a painting of classical model with much ecstatic beauty, was placed on the walls of the Casa Amarilla (Yellow House) in Caracas; his "Purgatorio," in the Pastora Church in that city, portrays with strength and vividness the tortures suffered by those falling short of Paradise. Arturo Michelena also did some religious pictures of value, but he is probably best known for his large painting of Francisco Miranda lying on a pallet in his dungeon meditating upon his fate. More ambitious are the paintings of Martín Tovar y Tovar, dealing with historical subjects, which decorate the elliptical hall of the Casa del Gobierno, or federal palace, in Caracas. Upon the concave ceiling is a well-conceived scene from the battle of Carabobo, with portrait likenesses of the leading officers; and on the walls are presented similar views of the conflicts at Ayacucho and Boyacá.

Ecuador, true to the tradition established in the colonial period, has since its independence done more in the field of art than some of its larger neighbors. Many painters have produced works of merit, but the country is especially indebted to Antonio Salas and his sons Ramón and Rafael for their contributions to the art history of the country. Salas the father (d. 1867) excelled in drawing and coloring, and received recognition through being made official portrait painter for the heroes of the wars for independence. His most famous work was "The Prophets," which was given a place in the archiepiscopal palace. Salas's son Ramón may be said to have founded the modern Quito school of painting through illustrating in charming water-color sketches the manners, customs, and costumes of the people of the capital. Thus he gave to the art of the country an individuality which for some time was continued by others. The most gifted of the family was Rafael, whom President García Moreno, recognizing his ability, sent abroad to study. After his return Rafael Salas taught in the academy of fine arts founded by García Moreno, and when that closed on the dictator's death he turned his studio into a school of art. In 1902 congress granted him a pension for life; but two years later, when the government opened a school of fine arts, he accepted a position on its faculty and taught landscape painting until his death in 1906. Rafael Salas not only portrayed with correctness and feeling the magnificent scenery of his native Ecuador, but definitely introduced landscape painting into the national art of the country.

To Uruguay likewise a family—Juan and Nicanor Blanes, father and son—gave artistic distinction. The former painted historical pictures, two of importance being "Artigas en 1810" and "Juramento de los Trenta y Tres" (The Oath of the Thirty-three), but more original was his vivid representation of an incident connected with the visit of yellow fever to Buenos Aires in 1871. The son, Nicanor Blanes, attracted attention through his sculptures, his best work being figures of aborigines.

During the past half-century Argentina has shown considerable activity in the field of art and has produced many creditable works, most of them representing the more conservative school, with French and Italian influence especially strong. One of the best among earlier canvases is Ernesto de Carcova's "Sin Pan y sin Trabajo" (Without Bread and without Work), a large realistic painting which, by the bareness and cheerlessness of surroundings, emphasizes the tragic situation of the unemployed couple. "Misia Mariquita," by Emilio Centurión, is an abler work and a very delightful study. It represents an elderly Argentine spinster, pious, well-dressed, contented, and smiling, but quite unintelligent, sitting with a half-opened fan in her plump, mitted hand. "La Canción del Fogo," by Carlos Ripamonte, faithfully recalls a picturesque phase of Argentina's past. A group of gauchos lounging under an ombú tree are listening with deep attention to one of their number who, accompanying himself on the guitar, sings a stirring song of the pampa.

Perhaps the most noted of the Argentine painters recently coming to the fore is Tito Cittadini, a very independent yet restrained modernist. His work first gained serious attention in 1921 through winning first prize at an exhibition in Buenos Aires. Other distinctions soon followed. His best pictures have been painted in Majorca, where he has made his home. They portray with deep feeling the blues and greens of the Mediterranean under the golden sunshine, and the craggy cliffs, wave-chiseled grottoes, and wind-blown pines and olive trees along the island strand.

More national in his work was the late Jorge Bermúdez, a contemporary of Cittadini. Acting upon the advice of his Spanish master, Zuloaga, to drink in the spirit of his native land and to paint under its influence, Bermúdez retired to the northwest and studied the population, especially in Jujuy and Catamarca. The result was a succession of fine, truly Argentine canvases breathing the atmosphere of the nation and portraying some of its most characteristic types. Among these are "Don Panta Vilques," "El Chico del Huaco" (The Boy with the Huaco), and "El Arriero y su Hijo" (The Muleteer and his Son).

The first artistic stir of importance in Chile was made by the work of the French artist Raimundo Monvoisin, who came to the country in 1843 and spent the next fifteen years there painting portraits and historical subjects and giving lessons in art between times. His best-known canvas depicts the abdication of Bernardo O'Higgins. In 1849 Italian influence was added to the French through appointment of a Neapolitan, Alejandro Ciccarelli, to head the academy of painting just established in Santiago. The greatest of Ciccarelli's pupils was Pedro Lira, who for forty years, through precept and example, fostered the art of the brush in Chile. Partly as a result, the country produced some creditable painters.

Though the Chilean school of sculpture was not organized until 1854, Chile has won a peerless position in sculpture in Latin America. French influence was great from the first, for the director of the school was the French sculptor Auguste François. Nicanor Plaza, who finished his course at the school in 1861 and later studied in Europe, was François's most distinguished Chilean pupil and one of Chile's three or four greatest sculptors. Plaza left several fine pieces, of which one of the best—and doubtless the best known—is his "Caupolicán," a statue of the famous Araucanian chieftain of Ercilla's poem. The figure, in bronze, gazes down from a high rock in the beautiful Santa Lucía Park in Santiago. There is perhaps more of art in the delicacy and charm of Plaza's "Quimera" (Chimera), a marble figure of a woman in the Museum of Fine Arts in the capital. Nicanor Plaza also gave to Chile a great pupil, Virginio Arias, whose earliest work to attract attention was his "El Roto Chileno," inspired by the War of the Pacific. It represents a humble Chilean farm laborer dropping his sheaf of wheat to grasp his rifle. Arias's masterpiece was "El Descendimiento" (The Descent from the Cross), a group characterized by exquisite grace and feeling; in 1887 it was awarded the grand prize of the Paris Salon. Another sculptor of much ability is Rebecca Matte de Iñiguez, great-granddaughter of Andrés Bello. Some of her works are close to Arias's best. Among these are "Qu'il Mourut," a majestic, defiant figure of Horace in white marble; "El Eco," a marble representing a young girl bending forward with a rapt, listening expression upon her happy face; "Dolor" (Sorrow), a marble bas-relief marking the graves of the artist's parents in the general cemetery of Santiago; a bronze "Monumento a los Héroes de la Concepción," which stands on the Avenida de las Delicias in Santiago; and—doubtless the best known—a vivid and eloquent study called "Guerra" (War) in the Peace Palace at The Hague.

BRAZILIAN ART

What was said above regarding training schools does not apparently apply to Brazil; for João VI founded an academy of fine arts there, it will be recalled, more than a century ago; and yet the country has made scant contribution to productive art. The explanation may be again the blighting effect of the tropical climate; but it should be recalled that the Brazilians, unlike the Spanish Americans, had no ancestral art tradition, for Portugal produced no great masters. Yet Brazil has a little work of fair merit to show, produced, on the whole, under French and Italian influence. Rodolfo Bernardelli, of Italian descent, won a reputation for able work in sculpture, and one of his most noted pieces, "Christo e a Adultera," is perhaps Brazil's best in that field of art. More has been done in painting, and historical subjects have made special appeal. Pedro Américo produced various battle scenes, but is best known for his "O Grito do Ypiranga," showing Dom Pedro with his mounted troops on the sloping banks of the Ypiranga proclaiming Brazil independent. An abler historical painter was B. Calixto, whose canvases are many. Three of the best are "Martim Affonso em Caminho de Piratininga" (Martim Affonso on the Road from Piratininga), which is notable for perspective and atmosphere; "O Poema de Anchieta" (The Poem of Anchieta), showing the Jesuit missionary alone by the sea, with a cross on the cliffs in the background silhouetted against the sky, and flying over the waves a solitary gull. The picture breathes religious quiet and spiritual conquest. Quite different is Calixto's painting of Domingos Jorge Velho, with broad-brimmed hat, ample poncho, high boots, and hand on gun barrel, representing the dynamic and dominating Paulista type. One of the prominent Brazilian artists of the modernist school is Georgina de Albuquerque, whose "Nua" (Nude) shows marked talent.

XXXIII

REGIONAL GROUPINGS AND WORLD RELATIONSHIPS OF LATIN AMERICA

When war ceases, the sense of human brotherhood will be stronger and "heroism" will no longer mean to kill, but only to serve or save, our fellows.

ANDREW CARNEGIE[1]

BOLÍVAR'S plan for a union of the American nations in the interest of peace, protection, and general advancement remained but a magnificent dream while the nations blunderingly tried to learn the science of practical politics. But the idea of coöperation and union persisted, and repeatedly congresses of states were held with this object in view. One of the earliest of these—inspired by the war of the United States against Mexico—took place in Peru in 1847, with delegates present from New Granada, Ecuador, Bolivia, and Chile. The avowed aim of the gathering was confederation for the purpose of preserving independence, territorial integrity, and sovereignty; but no organization resulted from the meeting. In 1865 another congress took place in Peru, with the same five countries represented and also Venezuela and Guatemala. This time the meeting was inspired by Spain's seizure of the Chincha Islands and by Napoleon III's intervention in Mexico. No permanent results came from the gathering, or from other conferences of small groups of Spanish-American states held later in the century.

The movement toward more inclusive congresses resulting in permanent organization originated with the United States; and its leader was James G. Blaine, who appears to have been inspired by Henry Clay's interest in Bolívar's Panama Congress of 1826. In November, 1881, Blaine, as American Secretary of State, issued to all independent nations of the Western World an invitation to send delegates to a congress to be held in Washington in November, 1882, "for the purpose of considering and discussing the methods of preventing war between the nations of America." His object in seeking to secure and maintain peace in the Western Hemisphere was partly to gain the general advantages that would result from it, but especially to obtain the benefits that would come to the trade of the United States through closer relations with the countries to the south. Several of the states accepted the invitation; but the time was inopportune, for, it will be recalled, the War of the Pacific was then in progress, and technically it continued until 1884. Moreover, within a month after the plan was launched Blaine had been dropped from the Department of State when Chester A. Arthur, who had become president after the assassination of Garfield, reorganized his cabinet. Hence the invitations to the international gathering were withdrawn.

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[1] From a speech on "War as the Mother of Valor and Civilization," published in John Barrett's *The Pan-American Union* (Washington, 1911), pp. 242–244.

The idea survived in Washington, however, and in July, 1888, invitations to a general American congress to meet in that capital were issued by Thomas Francis Bayard, at the time Secretary of State. The meeting took place in the winter of 1889–1890, with all the sovereign states of the New World represented except the Dominican Republic. Aside from any achievements, the mere fact of the gathering was of much significance, for never before in the history of the world had eighteen nations met in a period of peace to plan for the perpetuation of that peace and the fostering of neighborly commercial relations. It happened, very appropriately, that when the meeting occurred Blaine was again Secretary of State, and in this capacity he presided over the opening session. Numerous measures were proposed and adopted by the congress, including one favoring the construction of a Pan-American railroad to unite the various countries, by extending existing lines and building new ones, and another in behalf of a plan for international arbitration, which was declared to be "a principle of American international law." Unfortunately the second measure was not indorsed by the states themselves. The most important act of the conference was the formation of the International Union of American Republics for the collection and distribution of commercial information, to be represented by a bureau located in Washington. This seemed a fair promise of future gatherings. The bureau, which was to be under the supervision of the Secretary of State of the United States, should publish in the Spanish, Portuguese, and English languages a bulletin chiefly concerned with matters of general commercial interest.

The bureau was organized by William E. Curtis, who in 1890 was appointed its first director; and publication of the bulletin, handbooks, and other informational material began. Three times within the next thirteen years the control of the union was changed, until at the second Pan-American conference, held in Mexico in 1901–1902, complete democracy was achieved through the creation of a governing board made up of the diplomatic representatives in Washington of the Latin-American countries, with the Secretary of State of the United States as chairman. At this time the name "International Bureau of the American Republics" was adopted. The expenses of the organization were borne by the member nations in proportion to population.

At the second inter-American gathering matters concerned with commerce, such as trade-marks, copyrights, and patents, were discussed and became the subjects of various conventions between the nations represented. Of more general importance were the agreements in the interest of world peace. Most of the members of the conference went on record as adhering to the Hague Convention of 1899 for the peaceful settlement of disputes between nations, and many of them signed treaties for the arbitration of such important financial claims originating with citizens of their states as could not be settled by negotiation; but there was delay in the ratification of these agreements.

Five years later, in the winter of 1906, the third general American conference was called to order in Rio de Janeiro. At this gathering two new states, Cuba and Panama, took their seats for the first time. Considerable attention was again given to matters concerned with world peace as well as to commercial interests. One of the resolutions adopted recommended that the nations represented instruct their delegates to the next Hague Conference to work for a general treaty of arbitration; another suggested that they invite the Hague Conference to consider means to "diminish between nations conflicts having an exclusively pecuniary origin."

Two years after the meeting in the capital of Brazil precedent was set for inter-American conferences of a more special nature through the convening of a Pan-American scientific conference at Santiago, Chile. Subsequently other similar congresses took place and also gatherings for discussing problems concerned with labor, finance, journalism, and other matters of mutual interest.

Meanwhile the fourth international American conference took place in Buenos Aires in 1910. At this meeting agreements were signed with the aim of securing inter-American respect for trade-marks, patents, and copyrights, in regard to which little progress had been made. The question of disputes over pecuniary claims was also taken up; and the gathering voted that these should be submitted to the Hague Court unless the interested parties preferred a special tribunal. A new development was suggested by the adoption of a resolution favoring the interchange of professors and students between American universities.

At the Buenos Aires meeting the name of the bureau in Washington was changed to Pan-American Union; the director became the director-general, and the secretary became the assistant director. It was further agreed that in the capital of each American republic there should be a Pan-American committee to coöperate with the union.[1]

Owing to the World War the fifth Pan-American general conference was not held until thirteen years after the fourth had ended; by that time new influences, some of which had long been at work, had made themselves strongly felt in the Latin-American attitude toward the United States and were to be reckoned with in connection with later Pan-American conferences and with New World relationships in general. It seems well to consider here these influences, which were largely born of what has often been called "Yankeephobia," a hatred and fear of the United States.

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[1] Shortly before the fourth conference was held a beautiful white marble building for the union was completed in Washington. The building, made possible by a gift of $750,000 from Andrew Carnegie and a contribution of $250,000 from the American republics, furnished ample room for the various offices needed to take care of the expanded work of the union and also housed the Columbus Memorial Library, created by the union, which was devoted to works of reference relating to the Americas.

Evidence of such an attitude toward the United States appeared, even before Latin-American independence was won, in a remarkable letter written by Diego Portales to José M. Cea, his partner, in 1822, after word was received that the United States was preparing to recognize the new states to the south. "Let us beware in escaping from one domination not to fall under another," wrote Portales. "One tends to distrust those gentlemen who so highly approve the work of our champions of liberty without having in any way aided us: this is the cause of my fear. Why this anxiety of the United States to accredit ministers, delegates, and to recognize the independence of Spanish America without troubling themselves over it in any way? It is a curious system, my friend!"[1]

This feeling, however, seems to have received little, if any, support from other quarters at the time; but within a generation it had become somewhat general, owing largely to the annexation of Texas by the United States and to the war between the latter and Mexico. One result was the congress already mentioned as being held in Lima in 1847. William Walker's high-handed filibustering activities in Nicaragua, seemingly regarded by the United States government with unneutral indifference or even approval, roused in the five Central American states fears of their northern neighbor and tended to preserve the suspicion already existing in South America against the United States. Plans discussed during the next twenty years for Spanish-American leagues or confederations were aimed partly to secure protection against possible aggressions of the United States. A letter sent in 1862 by the Costa Rican government to Colombia regarding a "continental league" then under consideration is very significant. "If our Republics could have the guaranty that they have nothing to fear from the United States of North America," wrote the Costa Rican minister, "it is indubitable that no other nation could be more useful and favorable to us. Under the shelter of her powerful eagles, under the influence of her wise institutions, and under the spur of her astonishing progress our newly-born nationalities should receive the impulse which they now need, and would be permitted to march with firm step, without experiencing the troubles and difficulties with which they have had to struggle." He suggested that it might be possible to induce the United States to enter into compact "solemnly to respect, and cause others to respect, the independence, sovereignty, and territorial integrity of the sister republics of this continent; not to annex to their territory, either by purchase or by any other means, any part of the territory of the said republics; not to allow filibustering expeditions to be fitted up against the said nations, or to permit the rights of the latter to be in any way abridged or ignored."[1]

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[1] "Diego Portales a José M. Cea, Lima, Mar., 1822," in *Revista Chilena*, Vol. III (May, 1918), p. 145.

These observations of the little Isthmian state are perhaps fairly typical of the Latin-American attitude toward the great and growing American Union about the middle of the nineteenth century. The fact that the United States forced England in the later eighteen-fifties to withdraw from territory belonging to Honduras and Nicaragua was evidently thought to be caused by the self-interest of the United States rather than by any altruistic feeling toward Latin America. However, the stand taken by the government at Washington against the empire of Maximilian made a generally good impression throughout Latin America, and this was increased by the adverse action of the United States Senate in 1870 toward the annexation of the Dominican Republic. Furthermore, for a considerable period thereafter the United States was concerned chiefly with the solution of problems growing out of its great Civil War; hence no cause for the reawakening of serious suspicion against that republic seems to have appeared until the last decade of the century—after the first international American conference. Then causes for Latin-American resentment toward the United States came rather thick and fast.

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[1] Quoted in John Holladay Latané's *The United States and Latin America*, p. 297.

The first of these was the *Baltimore* trouble with Chile, taking place in 1891, which wiped out much of the friendly feeling toward the United States created by the recent gathering; for there appears to have been a rather general belief in Latin America that the authorities at Washington had not only interfered in Chile's domestic politics but had also browbeaten her into paying an unjust indemnity. This event seems to have been the immediate inspiration of a book published by a Paulista, Eduardo Prado, in 1893 under the title *Illusão Americana* ("The American Illusion"), which declared that the Monroe Doctrine, as indicated by the acts of the United States, had no altruistic aim toward Latin America; rather the contrary. Hence it would be well for Brazil to pursue her own policy and look out for herself. Already a more pronounced and persistent critic of the United States, Rufino Blanco Fombona, had begun to utter warnings: "The Yankees, the Yankees, these are the enemies of our soul, of our civilization, of our character, of our independence. . . ." And the services rendered by the United States to his native country, Venezuela, in her boundary controversy with Great Britain in no way made him change his mind.

The war between the United States and Spain and the events quickly following it brought new factors into the situation and increased criticism of the former. Before the war opened, the frequent and futile struggles of Cuba for freedom served to remind the states which were once Spain's colonies of ancient grievances against the mother country and prevented the development of sentimental attachment toward her. However, some of the old resentment toward Spain was lost even before the Spanish-American War ended; and the terms of the treaty of peace increased feeling against the United States, for once more the great northern republic had expanded territorially at the expense of Spanish America. Porto Rico and the Philippines were presumably permanently under the Stars and Stripes, and Cuba's independence was by no means certain. After the Cuban republic had been established, limited by the Platt Amendment, the terms of that amendment were a cause of resentment in Latin America.

More serious were the preliminaries to the building of the Panama Canal, the first being the adoption in 1901 of the Hay-Pauncefote Treaty, which, through abrogating the Clayton-Bulwer Treaty with its mutually self-denying pledge relating to Central America, gave the United States a free hand there. Great Britain soon showed her recognition of the significant change wrought by the new treaty through a decided reduction in the size of her West Indian fleet, leaving the United States dominant in the Western World.

An event of immediate and disastrous results was the part played by the United States government in connection with the independence of Panama, which has already been described. No other act of the United States has done so much toward creating suspicion and fear in the Latin-American countries. Some of their most brilliant writers denounced in biting words the "Colossus of the North." The first of the eminent ones, Rubén Darío, in his ode to Roosevelt, published in 1905, declared the strenuous president to be typical of his strong, proud, ruthless country, but warned him

> Se necesitaría, Roosevelt, ser por Dios mismo,
> El Riflero terrible y el fuerte Cazador,
> Para poder tenernos en vuestras férreas garras.[1]

A stand taken by Roosevelt in another regard also called forth criticism. In December, 1901, apropos of the controversy over the collection of Venezuelan debts, the President declared in his annual message that the coercion of a state was not contrary to the Monroe Doctrine if the punishment did not involve the "acquisition of territory by a non-American power." This view was repeated by implication in Roosevelt's message of the following year. These pronouncements led to a reply late in December, 1902, from Luis M. Drago, Argentine secretary of foreign relations, which is known as the Drago Doctrine. The public debts of Latin-American nations, he declared, could not properly be collected by force.[1]

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[1] You would need, Roosevelt, to be appointed by God himself, the terrible Marksman and mighty Hunter, in order to hold us in your iron claws.

That forcible collection of debts in Latin America by non-American nations might be embarrassing to the United States, Roosevelt later readily admitted; in December, 1904, he declared that as a means of preventing such action the United States might, under the Monroe Doctrine, be forced in flagrant cases of wrongdoing or weakness on the part of a state to exercise an international police power. This view, known as the "Roosevelt corollary of the Monroe Doctrine," was made the justification of a series of interventions by the United States government in Latin-American countries which greatly aggravated Latin-American fears and suspicions. These included the occupation of Nicaragua in 1909, of Haiti in 1915, of Santo Domingo in 1916, and of Nicaragua again in 1926, about a year and a half after the first intervention had ended.

Most of these acts caused vigorous private demonstrations against the United States in countries to the southeast of the Rio Grande. Mass meetings, especially by university students, were held at which fiery speeches were made denouncing that nation and uncomplimentary resolutions were adopted regarding it. A considerable portion of the Latin-American press became chronically unfriendly after Roosevelt "took" the Isthmus of Panama in 1903, and some of the ablest modernist writers, as has been stated, used their pens against the United States. In this Blanco Fombona was especially persistent; but Manuel Ugarte of Argentina, more energetic, made a speaking tour through South America for the purpose of spreading ill will against the "Colossus of the North" and warning of the danger from it. Collectively, these propagandists charged the American nation with most of the vices and shortcomings in the catalogue, but they especially emphasized its alleged sordid, selfish, grasping, money-worshiping materialism and its corresponding alleged lack of artistic, intellectual, and spiritual ideals.

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[1] This view was based upon that expressed more than twenty years before by the Argentine publicist Carlos Calvo in his work on international law.

The ills threatened by the "Yankee peril," it was declared, were, first, dominance by the United States through financial control resulting from loans and, finally, actual annexation. Commonly the critics ignored the facts that surplus capital almost inevitably flows to financial vacuums, that the loans from United States bankers were usually made at the earnest solicitation of needy Latin-American governments, and that in view of the bad financial and political records of most of the southern countries such loans could hardly be expected without rather high rates and exacting guaranties. With much more justice the critics attacked the tendency of American capitalists to meddle selfishly in the politics of countries where they had investments and the tendency of the United States authorities to undertake to protect such investments and to shape their policy toward Latin-American governments according to the treatment of American business interests by the latter. This policy was denounced in Latin America as "dollar diplomacy."

Those who warned against the danger of territorial annexation by the United States offered a strong argument in the fact that about four fifths of the soil over which the Stars and Stripes flew at the beginning of the twentieth century had once belonged to Spain or to Spanish America. Practical writers like Ernesto Quesada of Argentina pointed out that the aggressions of the United States had been made possible by the political weakness and economic demoralization of the Latin-American nations, and they urged these nations to save themselves by developing strong and efficient governments. Many were anxious that the dangers from the United States be met by a rallying of the former Spanish colonies round Spain. This was in harmony with the wishes of the latter. As early as the middle of the nineteenth century individual Spaniards had urged a rapprochement between the mother country and her lost children, and had carried on press propaganda in Spanish America to foster it; but various unfriendly acts of Spain (notably the war against

Peru) and the constant struggles of Cuba for independence prevented much response from Spanish Americans themselves. However, sentiment began to change rapidly after the war between the United States and Spain broke out in 1898. With the Cuban grievances against the mother country no longer existent to remind them of their own past ones, the Spanish-American countries cast aside much of their former resentment toward Spain. Yet from the American side the Pan-Spanish movement was hardly launched until 1906, when Amado Nervo addressed his *Epitalamio* to King Alfonso XIII of Spain. The idea of a spiritual union of the Spanish-speaking countries with Spain as a center was thereafter eagerly taken up and exploited by others of the ablest modernist writers of Latin America, and it was heartily echoed by many in the mother country and by the Spanish government itself. Numerous organizations were formed to foster the idea, and the Spanish authorities used every opportunity to increase the intellectual and spiritual ties with the Latin-American countries.

Some urged a union taking in Portugal and Brazil, but this met with little response from the latter, which, because of its different national ancestry and its unhappy colonial relations with Spain, felt itself rather apart from the Spanish-American countries; moreover, during the imperial period a strong tradition of friendship had been established with the United States, from which, because of Brazil's great size and its remoteness, there really seemed little to fear.

The resentment displayed toward it by the Latin-American nations was by no means lost upon the United States. Realizing that the existing situation was not conducive either to good world relations or to profitable business contacts with Latin America, the authorities in Washington at various times made efforts to repair damages. Thus, the Pan-American conference of 1906–1907 meeting in Rio de Janeiro was made the occasion of a visit by Secretary of State Elihu Root to South America, still disturbed by Roosevelt's high-handed treatment of Colombia in 1903. The speeches delivered by Root on his tour were intended to give reassurance, and were partly successful. "We wish for no victories but those of peace," he said on one occasion; "for no territory except our own; for no sovereignty except the sovereignty over ourselves."

A visit of Secretary of State Philander Knox to Central America in 1912 also aimed to allay fears raised by subsequent acts of the United States, especially in connection with Nicaragua. In his addresses Knox vigorously disavowed all selfish aims on the part of the United States, but with less result than came from the efforts of Root in South America. The best result of the Knox mission perhaps was the fuller realization of the deep dislike felt upon the Isthmus for the United States.

This knowledge apparently led President Wilson to make use of the commercial convention held in Mobile, Alabama, in October, 1913, to pour oil upon the troubled waters of Pan-Americanism. In the speech delivered on that occasion he declared the American states to be "a family of mankind devoted to the development of true constitutional liberty," and offered assurances of just and fair dealing by his country with its neighbors. This produced a favorable impression in Latin America, which was, on the whole, increased by Wilson's willingness to accept Latin-American coöperation in connection with the relations with Huerta of Mexico. The President's annual message of 1915 went some steps farther and disavowed the idea of wardship or guardianship over Latin America implied by the Monroe Doctrine, and declared the relationship between the American nations to be "a full and honorable association as of partners between ourselves and our neighbors, in the interest of all America, north and south." The American states were "not hostile rivals, but coöperating friends." "Pan-Americanism" was defined by Wilson as "the effectual embodiment of the spirit of law and independence and mutual service." These ideals, which the President later again expressed in somewhat different form, were called the "new Pan-Americanism" (a name given by Ernesto Quesada), or the "Wilson Doctrine," and on the whole they were received with much satisfaction and pleasure in Latin America. A new era in relations between the United States and Latin America seemed to have dawned.

Because of the policy adopted by Woodrow Wilson, the Latin-American nations as a whole were proud to recognize his leadership, during the early years of the World War, in the common struggle of the Americas to preserve neutrality. Their confidence in his altruistic international aims was increased by the unselfish tone of his message to Congress recommending war with Germany, in which he declared that "the world must be made safe for democracy."

This spirit of Pan-American solidarity, chiefly produced by President Wilson's utterances, influenced various Latin-American states to take a stand against Germany after the United States had entered the war; but other factors obviously played a part. Eight of the countries—Cuba, Panama, Haiti, Costa Rica, Nicaragua, Honduras, Guatemala, and Brazil—declared war against Germany. The first two took action the day after the United States. As has been stated elsewhere, President Menocal of Cuba doubtless acted partly to strengthen his political position. Panama could hardly remain aloof with the United States, its protector, in the war. Haiti, though under American domination at the time, was naturally strongly in sympathy with France, since the cultural ties between the two were very close. Nicaraguan action is partly to be accounted for by the fact of military occupation by the United States, which made it possible for the Conservative party to remain in control of the government. In the opinion of Percy A. Martin the governments of Guatemala and Honduras were moved to declare war against Germany through interest in securing control of German holdings in those countries as well as through resentment against the policy of Germany and the desire to work in harmony with the United States. Honduras, which was preceded by Guatemala in the matter, was doubtless also moved by the fear that the latter might have an advantage with the United States, which was at the time acting as mediator in a Guatemalan-Honduranean boundary dispute. Though the Costa Rican people were much in favor of the Allies in the war, the formal alignment with the latter was caused by the desire of the unconstitutional government then in office to intrench itself better through winning favor abroad. Brazil, three of whose vessels were sunk by Germany, was the only one of the eight Latin-American belligerents having any direct and serious grievance against that power; yet even Brazil was influenced by the action of the United States. In his message to congress of May 22, 1917, which by implication recommended war, President Wenceslau Braz referred specifically to the "traditional friendship" binding Brazil to the United States.

Five Latin-American nations—Bolivia, Ecuador, Peru, Uruguay, and the Dominican Republic—severed diplomatic relations with Germany but did not enter the war.

The seven remaining nations declared their neutrality. Colombia, though sympathetic toward the Allies, was still bitter toward the United States because of the loss of Panama; Venezuela's government was largely pro-German in feeling; Carranza of Mexico also was very favorable to Germany, and his country was riddled with pro-German propaganda.

At the Versailles Peace Conference it became apparent that the Latin-American countries—more than half of which were represented—were henceforth to be permitted a larger part in world affairs. Delegates from a number of them were placed upon important committees, Epitacio Pessôa, head of the Brazilian group, being a member of the commission which drafted the Covenant of the League of Nations. Ten Latin-American countries—Bolivia, Brazil, Cuba, Guatemala, Haiti, Honduras, Nicaragua, Panama, Peru, and Uruguay—became original members of the League. Shortly afterwards Argentina, Chile, Colombia, Costa Rica, Paraguay, Salvador, and Venezuela joined it. The Dominican Republic did so in 1924, for a time making all, except Ecuador and Mexico, members of it.[1] Promptly upon the organization of the Permanent Court of International Justice in 1920, most of the Latin-American countries became adherents of it likewise. Within the next few years nationals of these countries had served as presidents of both the Assembly and the Council of the League and had been made judges of the World Court.

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[1] Some of the nations later withdrew temporarily, but returned. In 1926 Brazil, offended at not being made a permanent member of the Council, announced her resignation, to take effect two years later, and in 1928 she refused to reconsider her action and left the League. In 1930 Brazil and Costa Rica, as well as Mexico and Ecuador, were not members of the League.

As a result of President Wilson's leadership during the World War and of the closer trade relationship established between the United States and Latin America in consequence of that conflict, more intimate cultural contacts began to develop between the two. Though there had long been in Latin America hatred and fear of the United States, there had also existed much genuine admiration. Many thoughtful, public-spirited people from these southern lands now urged that greater national progress could be secured by following the lead of the oldest of the American republics and learning of it, which was strong where they were weak, rather than by ignoring and pretending to scorn it and looking for inspiration to the countries of southern Europe, which on the whole suffered from the same weaknesses and handicaps as they. This attitude helps explain the rapid growth, in all the Latin-American countries following the World War, of the desire to learn English, and also the fact that the number of young people sent from Latin America to study in the United States increased greatly, as did the number of educators commissioned to investigate the American public-school system.

Yet even when enthusiasm for President Wilson was greatest, some propaganda against the United States was carried on in Latin America and suspicion of that country continued—in some cases among government officials as well as in private quarters. This partly explains the interest of the Latin-American countries in the League of Nations. It seemed to offer security against the "Colossus of the North" in particular as well as against international menaces in general. It also accounts for the fact that the weaker nations to the south tried to secure through the League a definition of the Monroe Doctrine, for to many it had come to seem a mere pretext on the part of the United States for the exploitation of the other American countries.

After 1919 the feeling against the United States became stronger than it had been before the war. President Wilson had lost his world leadership; and the nation he had headed had refused to participate in the League of Nations, which had been organized to foster justice and peace by protecting the weak against the strong. Hence the fact that the United States still occupied some of the small Caribbean states and dominated others once more loomed large in Latin-American consciousness. Moreover, there came new incidents to rouse Latin-American feeling: the undiplomatic notes of Secretary of State Kellogg to Mexico, the treaty negotiated with Panama early in 1926, and the extensive intervention in Nicaragua begun late in the same year. The last-named incident caused a tremendous storm of protest from the Latin-American press.

Before this second occupation of Nicaragua took place the faith in the League of Nations as a bulwark against the United States had begun to wane in Latin America; for the Covenant of the League had recognized the Monroe Doctrine and the League had avoided defining that famous pronouncement and, unwilling to offend the United States, had also failed to undertake the settlement of the Chilean-Bolivian dispute (see page 557). Hence the Latin-American governments turned to more direct methods to combat aggressions on the part of the powerful republic of the north.

A serious move in this direction was made at the long-delayed fifth Pan-American conference, which took place in Santiago, Chile, early in 1923. Here much activity was displayed by some of the South American nations in bringing forward plans for preventing aggression and for maintaining peace in the Americas. Especially significant was the proposal of the Uruguayan delegation that the principle of the Monroe Doctrine be accepted by all the American states. This was intended to do away with the unilateral character of the doctrine by giving all the nations a share with the United States in its enforcement. However, the representatives from that country opposed the measure and prevented favorable action. An attempt was also made to reach an agreement for the limitation of naval armament in the New World, but upon this Argentina, Brazil, and Chile were divided. A plan brought forth by Costa Rica in behalf of an American permanent court of international justice also failed, because the plan presented involved the arbitration of questions concerning vital interests. It was voted, however, to refer the matter of the court to the International Commission of Jurists scheduled to meet in Rio de Janeiro in 1925,[1] and to take up the question of the Monroe Doctrine at the sixth Pan-American conference.

Much dissatisfaction and indignation were expressed by Latin Americans over the Santiago meeting. The United States was denounced for blocking the plan advanced by Uruguay to prevent continued aggressive dominance from Washington, and was blamed for the failure of some of the other proposals having the same general end in view. The part played at Santiago by the powerful northern republic was pointed out by some propagandists as proof of its aim to keep the other American states weak and helpless, in order the better to absorb or conquer them. Pan-Americanism was declared to be a farce at its best, and at its worst a pretext for the development of "Yankee imperialism" in the Americas. It was predicted that the sixth Pan-American conference, scheduled to meet in Havana in 1928, would be the last of such gatherings.

Various energetic Latin-American statesmen still retained hope, however; and as the time for the conference approached, it became known that they were planning to use the meeting for bolder attempts to curtail the power of the United States in its relation with the other Americas. This doubtless contributed toward a shift in the Latin-American policy of the Coolidge administration. The furor raised in Latin America by the second Nicaraguan intervention also played a part. More influential still was the severe disapproval displayed by public opinion in the United States regarding the Kellogg policy toward Nicaragua and toward Mexico.

The change first showed itself in the resignation of James R. Sheffield as ambassador to Mexico and the appointment of

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[1] The meeting of the commission did not take place until April, 1927, and nothing was accomplished by it regarding the specific matter in question; but a project—to be referred to the sixth Pan-American conference for action—was adopted regarding the pacific settlement of international disputes.

Dwight W. Morrow, who in a few months had completely revolutionized Mexican-American relations. The continuance of Lindbergh's good-will flight from Mexico on through Central America, Colombia, Venezuela, and the island republics was another indication of a new desire in governmental circles of the United States to cultivate friendly relations with the republics to the south. There was also significance in the fact that Colonel Lindbergh's flight was so timed as to enable him to reach Havana while the sixth Pan-American conference was in session.

This assembly opened in January, 1928, with all the American states represented, despite the predictions of Latin-American critics that attendance would be very meager. The administration at Washington, realizing the disastrous potentialities of the gathering for the Pan-American movement and the prestige of the United States, had made careful preparations to avert trouble. Former Secretary of State Charles Evans Hughes, whose tact and political wisdom were unquestioned, was made head of his country's delegation and, later, vice president of the conference. President Coolidge accepted an invitation to attend which was personally extended by Gerardo Machado, the Cuban executive, while on a recent visit to the United States. Coolidge was present for the opening session, and helped to improve the temper of the gathering by his address, which was a challenge to American pride, solidarity, and desire for achievement. But much more was accomplished by Mr. Hughes, who showed consummate skill in mollifying disaffected delegates and in steering the conference past dangers which might have wrecked it.

After the smoke of political battle had cleared away and the combatants had departed, it was evident that the hostile Latin-American element had gained a little ground. Though they had failed in their efforts to make the office of director-general of the Pan-American Union rotative among the nations, they had won the right of the member states to name special agents to represent them on the governing board of the union, instead of having their diplomats in Washington as spokesmen. Obviously this was conducive to greater independence with reference to Pan-American matters. The repeated attempts of Gustavo Guerrero of Salvador to secure the inclusion of the principle of nonintervention in the American code of international law was defeated through Mr. Hughes's pointing out that the function of the committee headed by Señor Guerrero was to codify international law, not to make it—to state the law as it was, not as it ought to be. Furthermore, when the question of giving the union authority to intervene in international disputes was brought to the front, it was defeated by a vote of twelve to six, with the United States delegation on the majority side. These various decisions made it clear that Latin-American or Spanish-American solidarity against the United States was nonexistent.

Perhaps the most important decision made at the Havana meeting was the adoption of a resolution in favor of a conference to be held promptly in Washington to consider plans for the adoption of the arbitration principle between the countries forming the Pan-American Union.[1]

The policy, tardily adopted by the Coolidge administration, of cultivating friendship and understanding with the Latin-American countries, was vigorously followed up by its successor. Immediately after his election as president, Herbert Hoover, with Mrs. Hoover and their son Alan, left for Latin America on a visit which included about a dozen countries. During the tour he was received with presidential honors, and delivered addresses in favor of mutual understanding which were well received everywhere. A few weeks after his inauguration President Hoover made a more significant move, though one that attracted far less attention than his unprecedented visit to Latin America: he ordered the Department of State to prepare a restatement of the Monroe Doctrine, with a view to removing the misunderstanding which had grown up in Latin America with reference to this unique feature of the foreign policy of the United States.[1] This was a recognition of the important fact that in the century which had passed since President Monroe made his famous pronouncement the Latin-American states as a whole had grown up. Most of them had developed the sense of responsibility coming with maturity. Hence their national dignity was worthy of respect, and their good will was not to be lightly disregarded by the United States of America.

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[1] This conference assembled in December, 1928, and was in session when the boundary dispute between Bolivia and Paraguay threatened to result in war and was largely responsible for the maintenance of peace (see page 629). The gathering drafted treaties of conciliation and arbitration; but a number of the countries would not sign the latter until a protocol providing for reservations was added. The United States was one of the countries agreeing unreservedly to arbitration of inter-American disputes.

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[1] The implicit response to this came early in 1930, when a *Memorandum on the Monroe Doctrine*, prepared by J. Reuben Clark when Under-Secretary of State, was issued by the government printing office. It deals largely with the past, and does little or nothing toward clarifying the question as to what the Monroe Doctrine means today, or toward giving Latin America assurance for tomorrow regarding its application.

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I. THE GEOGRAPHIC SETTING AND ITS INFLUENCE

Useful maps may be found in the *Atlas América Latina* (New York, 1919), W. Sievers's *Süd- und Mittelamerika* (Leipzig, 1914), William R. Shepherd's *Historical Atlas* (New York, 1929), Isaiah Bowman's *South America* (Chicago, 1915), and A. H. Keane's *Central and South America* (2 vols., New York, 1909–1911).

The best general work is R. H. Whitbeck's *Economic Geography of South America* (New York, 1926). The following are also valuable: Elisée Réclus, *Nouvelle Géographie universelle*, Vols. XVIII and XIX (Paris, 1893–1894); Ellsworth Huntington, *Civilization and Climate* (New Haven, 1915); ——, *World Power and Evolution* (New Haven, 1919); ——, "Adaptability of the White Man to Tropical Climate," in *Latin America: Clark University Addresses* (New York, 1914); ——, "Changes of Climate and History," *American Historical Review*, Vol. XVIII, pp. 213–232; ——, *The Red Man's Continent* (New Haven, 1919); W. S. Barclay, "The River Paraná: an Economic Survey," *Geographical Journal*, Vol. XXXIII, pp. 1–40; Isaiah Bowman, "Man and Climatic Change in South America," ibid., Vol. XXXIII, pp. 267–278; P. Vidal de La Blanche, *Principles of Human Geography* (New York, 1926); Ellen Churchill Semple, *Influences of Geographic Environment* (New York, 1911); Charles E. Woodruff, *The Effects of Tropical Light on White Man* (New York, c. 1916); Philip H. Manson-Bahr, *Manson's Tropical Diseases* (New York, 1921); Samuel J. Record and Clayton D. Mill, *Timbers of Tropical America* (New Haven, 1924); Wilson Popenoe, "Round about Bogota," *National Geographic Magazine*, February, 1926 (treats of vegetation); Charles Darwin, *The Voyage of the Beagle* (Harvard Classics, New York, 1909); Professor and Mrs. Louis Agassiz, *A Journey in Brazil* (Boston, 1868); H. W. Bates, *The Naturalist on the River Amazon*; W. H. Hudson, *Birds of La Plata* (2 vols., London, 1920); W. E. Safford, "Food Plants and Textiles of Ancient America," Proceedings of the Second Pan-American Scientific Congress, Vol. I, pp. 146–159; *Encyclopedia of Latin America* (New York, 1917); Isaiah Bowman, *Desert Trails of Atacama* (New York, 1924); R. W. Shufeldt, "Birds of Central America," *Bulletin of the Pan-American Union*, February, 1925.

II. THE ABORIGINAL AMERICANS

A. L. Kroeber's *Anthropology* (New York, c. 1923), contains an excellent general discussion. D. G. Brinton's *American Race* (New York, 1891) is old but still valuable. For the Mayas the following by two leading authorities are of primary importance: Sylvanus Griswold Morley, *An Introduction to the Study of the Maya Hieroglyphs* (Washington, 1915); ——, "The Foremost Intellectual Achievement of Ancient America," *National Geographic Magazine*, Vol. XLI, pp. 109–130; Herbert J. Spinden, *Ancient Civilizations of Mexico and Central America* (New York, 1917); ——, *A Study of Mayan Art, its Subject Matter and Historical Development* (Cambridge, 1913); ——, "Ancient Mayan Astronomy," *Scientific American*, January, 1928; ——, "Archæology: Mexico and Central America," Encyclopædia Britannica, thirteenth edition. The best early Spanish account of the Mayas is Diego de Landa's *Relation des choses de Yucatan de Diego de Landa; texte espagnol et traduction par Brasseur de Bourbourg* (Paris, 1864). The best illustrations and general descriptions of the Mayan ruins are to be found in two works by John L. Stephens: *Incidents of Travel in Central America, Chiapas, and Yucatan* (New York, 1841) and *Incidents of Travel in Yucatan* (New York, 1843). Other works by specialists are Thomas A. Joyce's *Mexican Archæology* (New York, 1914), a general work; Thomas Gann's *Ancient Cities and Modern Tribes* (New York, 1926); S. K. Lothrop's *Tulum, an Archæological Study of the East Coast of Yucatán* (Washington, 1924); Frans Blom and Oliver La Farge's *Temples and Tribes: a Record of the Expedition to Middle America conducted by the Tulane University of Louisiana in 1925* (2 vols., New Orleans, 1926); Gregory Mason's *Silver Cities of Yucatan* (New York, 1927), with an introduction by H. J. Spinden; T. A. Willard's *The City of the Sacred Well* (New York, 1926); and A. M. Tozzer's "Time and American Archæology," *Bulletin of the Pan-American Union*, January, 1928. A detailed study of the Zapotecan city of Mitla is to be found in William J. Holmes's *Archæological Studies among the Ancient Cities of Mexico* (Chicago, 1895). The best general account of Aztecan culture is perhaps still to be found in William H. Prescott's *Conquest of Mexico* (various editions). The following studies by Zelia Nuttall bear wholly or largely upon Mexican archæology: "The Island of Sacrificios," *Ameri-*

can Anthropologist, April–June, 1910; "Some Unsolved Problems in Mexican Archæology," ibid., January–March, 1906; "New Year of the Tropical American Aborigines," *Bulletin of the Pan-American Union*, January, 1928; "Fundamental Problems of the Old and New Civilizations," *Archæological and Ethnological Papers of the Peabody Museum*, Vol. II (Cambridge, 1901). Material on the pre-Cortesian Mexican culture is also scattered through the writings of various Spanish conquistadores, the best for the purpose perhaps being BERNAL DÍAZ DEL CASTILLO's "True History of the Conquest of New Spain," Hakluyt Society Publications, Second Series, Vol. XL. For the peoples of the intermediate region between the Mayas and the Incas the best general work is perhaps THOMAS A. JOYCE's *Central American and West Indian Archæology* (London, 1916). An intensive study of the Chibchas is V. RESTREPO's *Los Chibchas antes de la conquista española* (Bogotá, 1895). The best general work on pre-Spanish South America is THOMAS A. JOYCE's *South American Archæology* (New York, 1912). Two good studies dealing largely with pre-Incaic cultures are JULIO C. TELLO's *Introducción de la Historia Antigua del Peru* (Lima, 1921) and MAX UHLE's *Pachacamac: Report of the William Pepper Peruvian Expedition of 1896* (University of Pennsylvania Department of Archæology, Philadelphia, 1903). A. L. KROEBER's article "Coast and Highland in Prehistoric Peru," *American Anthropologist* (1927), pp. 624–653, considers the relationship between the two cultural areas. ADOLPH F. BANDELIER's *Islands of Titicaca and Koati* (New York, 1910) is a detailed study of pre-Spanish cultures in a limited area. Good general accounts of the culture of the Incas are included in WILLIAM H. PRESCOTT's *History of the Conquest of Peru* (various editions), FRIEDRICH RATZEL's *History of Mankind* (3 vols., New York, 1896–1904), and OTFRID VON HANSTEIN's *World of the Incas* (New York, 1925). The best study of the Incas dating from the early Spanish period is GARCILASSO DE LA VEGA's *First Part of the Royal Commentaries of the Yncas by the Ynca Garcilasso de la Vega*, translated and edited with notes and an introduction by Clements R. Markham (Hakluyt Society Publications, London, 1869). E. GEORGE SQUIER's *Peru: Incidents of Travel and Exploration in the Land of the Incas* (London, 1877) contains illustrations and descriptions of the archæological remains. HIRAM BINGHAM's *Inca Land* (Boston, 1922) is the report of an archæological expedition. RAFAEL KARSTEN's *Civilization of the South American Indians, with Special Reference to Magic and Religion* (New York, 1926) is an authoritative work on the subject. Material upon the Araucanians is to be found in various general histories of Chile (see bibliography for Chapter XXVI) and also in Volume II of J. IGNATIUS MOLINA's *Geographical, Natural, and Civil History of Chili*, translated from the original Italian by an American gentleman (2 vols., Middletown, Connecticut, 1808). GEORGE EARL CHURCH's *Aborigines of South America* (London, 1912) is a general work treating to a considerable extent of the present characteristics of the backward Indians.

III. THE MAKING OF THE HISPANIC PEOPLES

Spain. The best work in English upon the history of Spain is CHARLES E. CHAPMAN's *History of Spain* (New York, 1918), which is based upon RAFAEL ALTAMIRA Y CREVEA's *Historia de España y de la civilización española* (4 vols., Barcelona, 1909–1914), the most valuable work in Spanish. Other good general works are *The Spanish People* (New York, 1901) and *Spain, its Greatness and Decay* (Cambridge, 1905), both by Martin A. S. Hume, and Salcedo y Ruiz's *Historia de España* (Madrid, 1914). Roger B. Merriman's *Rise of the Spanish Empire in the Old World and in the New* (3 vols., New York, 1918–1925) is the best work on the period covered. The following special works are valuable: Amador de los Ríos, *Historia de los Judíos de España y Portugal* (3 vols.); Adolfo de Castro y Rossi, *The History of the Jews in Spain*, translated by Edward D. G. M. Kirwan (Cambridge, 1851); S. P. Scott, *History of the Moorish Empire in Spain* (3 vols., Philadelphia, 1904); Stanley Lane-Poole, *The Story of the Moors in Spain* (New York, 1891); E. S. Bouchier, *Spain under the Roman Empire* (Oxford, 1914); H. E. Watts, *The Christian Recovery of Spain* (New York, 1901); William H. Prescott, *History of the Reign of Ferdinand and Isabella* (various editions); I. Plunket, *Isabel of Castile and the Making of the Spanish Nation* (New York, 1915); E. Armstrong, *The Emperor Charles V* (2 vols., New York, 1902); Martin A. S. Hume, *Philip II of Spain* (New York, 1897); C. H. Lea, *A History of the Inquisition in Spain* (4 vols., New York, 1908); ——, *The Moriscos of Spain; their Conversion and Expulsion* (Philadelphia, 1901); Charles H. Cunningham, "The Institutional Background of Spanish-American History," *Hispanic-American Historical Review*, February, 1918; Julius Klein, *The Mesta* (Cambridge, 1920); Henry John George Herbert, Lord Carnarvon, *Portugal and Gallicia, with a Review of the Social and Political State of the Basque Provinces* (2 vols., London, 1838); M. Dieulafoy, *Art in Spain and Portugal* (New York, 1913).

Portugal. No good history of Portugal exists in English. The best is perhaps H. Morse Stephens's *Story of Portugal* (New York, 1891). A standard work in Portuguese is J. P. Oliveira Martins's *Historia de Portugal* (sexta edicao, 2 vols., Lisboa, 1901). The following histories are of value: G. Young, *Portugal, Old and Young* (Oxford, 1917); C. Raymond Beazley, *Prince Henry the Navigator* (New York, 1897); Oliveira Martins, *The Golden Age of Prince Henry the Navigator*, translated by J. J. Abraham and W. E. Reynolds (London, 1914); V. de Bragança Cunha, *Eight Centuries of Portuguese Monarchy* (New York, 1911); W. A. Salisbury, *Portugal and its People: a History* (London, 1910); W. H. Koebel, *Portugal, its Land and People* (London, 1909); K. G. Jayne, *Vasco da Gama and his Successors, 1460–1580* (London, 1910); V. M. Shillington and A. B. Wallis Chapman, *The Commercial Relations of England and Portugal* (London, n. d.).

IV. THE HISPANIC INVASION OF ABORIGINAL AMERICA

The following are the best general works: C. de Lannoy and H. Van der Linden, *Histoire de l'expansion coloniale des peuples européens, Portugal et Espagne* (Brussels, 1907); Diego Barros Arana, *Historia de América* (2 vols., Santiago de Chile, 1908); Carlos Navarro y Lamarca, *Compendio de la Historia General de América* (2 vols., Buenos Aires, 1910); R. G. Watson, *Spanish and Portuguese South America during the Colonial Period* (2 vols., London, 1884); and Justin Winsor, *Narrative and Critical History of America.*

Spanish. Edward Gaylord Bourne, *Spain in America* (New York, c. 1904) (an admirable work); Roger Bigelow Merriman, *The Rise of the Spanish Empire* *in the Old World and in the New*; HERBERT E. BOLTON and THOMAS M. MARSHALL, *The Colonization of North America* (New York, 1920); JUSTIN WINSOR, *Christopher Columbus* (Cambridge, 1892); C. R. MARKHAM, *Life of Christopher Columbus* (London, 1892); JOHN BOYD THACHER, *Christopher Columbus* (3 vols., New York, 1903–1904); IRVING B. RICHMAN, *Spanish Conquerors* (New Haven, 1919); A. HELPS, *Spanish Conquest in America* (4 vols., London, 1900); WILLIAM H. PRESCOTT, *The Conquest of Mexico* (3 vols., Philadelphia, 1892); ——, *The Conquest of Peru* (various editions); RICARDO FERNÁNDEZ GUARDIA, *History of the Discovery and Conquest of Costa Rica*, translated by Harry Weston Van Dyke (New York, c. 1913); GREGORIO FUNES, *Ensayo de la Historia Civil del Paraguay, Buenos Aires, y Tucumán* (third edition, Buenos Aires, 1910–1911); F. A. MACNUTT, *Fernando Cortés and the Conquest of Mexico* (New York, 1909); C. R. MARKHAM, *The Conquest of New Granada* (New York, 1912); J. A. ZAHM, *The Quest of El Dorado* (New York, 1917); BERNARD MOSES, *The Spanish Dependencies in South America* (2 vols., New York, 1914); M. L. AMUNÁTEGUI, *Descubrimiento y conquista de Chile* (Santiago, 1913); J. LLOYD MECHAM, *Francisco de Ibarra y Nueva Vizcaya* (Durham, 1927). Much interesting and valuable source material dealing with the Spanish conquest has been published. Among the best are the selections in the Original Narratives of Early American History Series, the first volume of which contains the "Original Narratives of the Voyages of Columbus," edited by EDWARD G. BOURNE (New York, 1906). An especially fascinating account is ANTONIO PIGAFETTA'S *Magellan's Voyage around the World*, translated and edited by James Alexander Robertson (2 vols., Cleveland, 1902). A number of sources have been published by the Hakluyt Society, including HERNAN CORTES'S "Fifth Letter" (Hakluyt Society Publications, First Series, Vol. XL), BERNAL DÍAZ DEL CASTILLO'S "True History of the Conquest of New Spain" (ibid., Second Series, Vol. XL), GARCILASSO DE LA VEGA'S "Expedition of Gonzalo Pizarro to the Land of Cinnamon, A.D., 1539–1542" (ibid., Vol. XXIV), and many others. The histories of individual Latin-American countries included in the references listed for Chapters XVI to XXIX, inclusive, of this book also contain material on the coming of the Spaniards.

Portuguese. ROBERT SOUTHEY'S *History of Brazil* (3 vols., London, 1810–1819) is the most comprehensive work in English. JOÃO RIBEIRO'S *Historia do Brasil* (fifth edition, Rio de Janeiro, 1914) and ROCHA POMBO'S *Historia do Brasil* (seventh edition, São Paulo, 1918) and *Historia de São Paulo* (second edition, São Paulo, 1923) are good brief accounts in Portuguese. Two works by MANOEL DE OLIVEIRA LIMA, *The Evolution of Brazil compared with that of Spanish and Anglo-Saxon America* (Stanford University, 1914) and *Formation historique de la nationalité brésilienne* (Paris, 1911), contain some material. See also histories of Portugal.

V. POLITICAL ADMINISTRATION OF THE SPANISH INDIES

Material is to be found in the general works cited for Chapter IV. Good brief accounts are given in the following: A. G. KELLER, *Colonization: a Study of the Founding of New Societies* (Boston, c. 1908); WILHELM ROSCHER, *The Spanish Colonial System*, translation edited by E. G. Bourne (New York, 1904); A. ZIM-

MERMAN, *Die Kolonialpolitik Portugal und Spanien*; CARLOS PEREYRA, *Historia de la América Española*, Vol. II; P. LEROY BEAULIEU, *De la colonization chez les peuples modernes* (various editions); and BERNARD MOSES, *The Establishment of Spanish Rule in America* (New York, 1898) and *The Spanish Dependencies in South America* (2 vols., London, 1914). Most of the best special studies are included in the following books and articles: CHARLES A. CUNNINGHAM, *The Audiencia in the Spanish Colonies* (Berkeley, 1919); LILLIAN ESTELLE FISHER, *Viceregal Administration in the Spanish-American Colonies* (Berkeley, 1926); ——, *The Intendant System in Spanish America* (Berkeley, 1929); ——, "Teodoro de Croix," *Hispanic American Historical Review*, November, 1929; C. E. CASTEÑEDA, "The Corregidor in Spanish Colonial Administration," ibid.; ARTHUR S. AITON, *Antonio de Mendoza, First Viceroy of New Spain* (Durham, 1927); C. H. HARING, "The Genesis of Royal Government in the Spanish Indies," *Hispanic-American Historical Review*, May, 1927; W. W. PIERSON, "Some Reflections on the Cabildo as an Institution," ibid., November, 1922; CHARLES A. CUNNINGHAM, "The Institutional Background of Spanish-American History," ibid., February, 1918; W. W. PIERSON, "The Establishment and Early Functioning of the Intendencia of Cuba," *Studies in Hispanic-American History* (Chapel Hill, 1927), edited by W. W. Pierson; HERBERT INGRAM PRIESTLEY, *José de Galvez, Visitor-General of New Spain, 1765–1771* (Berkeley, 1916); DON E. SMITH, *The Viceroy of New Spain*; R. R. HILL, "Office of Adelantado," *Political Science Quarterly*, Vol. I; CHARLES W. HACKETT, "Delimitation of Political Jurisdictions in Spanish North America to 1535," *Hispanic-American Historical Review*, February, 1918; F. W. BLACKMAR, *Spanish Institutions in the Southwest* (Baltimore, 1891).

VI. SPAIN'S ECONOMIC ADMINISTRATION OF HER COLONIES

The best work dealing with this subject is CLARENCE H. HARING'S *Trade and Navigation between Spain and the Indies* (Cambridge, 1918). Brief accounts are to be found in general works and histories of different countries. The depredations of the pirates are treated in the following: CHARLES A. JOHNSON, *A General History of the Pyrates* (2 vols., fourth edition, London, 1726); JOHN ESQUEMELING, *The Buccaneers of America* (London, 1911); CLARENCE H. HARING, *Buccaneers in the West Indies in the Seventeenth Century* (New York, 1910); FRANCIS PRETTY, "Sir Francis Drake's Famous Voyage around the World," and WALTER BIGGS and others, "Drake's Great Armada," Harvard Classics, Vol. XXX (New York, 1910). See also the following: WILLIAM LYTLE SCHURZ, "The Spanish Lake," *Hispanic-American Historical Review*, May, 1922; ——, "Mexico, Peru, and the Manila Galleon," ibid., November, 1918; I. A. WRIGHT, "The Dutch and Cuba," ibid., November, 1921; ——, "Rescates: with Special Reference to Cuba," ibid., August, 1920; ARTHUR S. AITON, "The Asiento Treaty as reflected in the Papers of Lord Shelburne," ibid., May, 1928; VERA LEE BROWN, "Contraband Trade: a Factor in the Decline of Spain's Empire in America," ibid.; ARTHUR P. WHITAKER, "The Commerce of Louisiana and the Floridas at the End of the Eighteenth Century," ibid.; BERNARD MOSES, *Spain's Declining Power in South America* (Berkeley, 1919); ARTHUR P. WHITAKER, *The Spanish-American Frontier, 1783–1795* (Boston, 1927).

VII. THE CHURCH IN THE SPANISH INDIES

See the national histories listed for Chapters XVI to XXIX, inclusive, especially BANCROFT'S, TORO'S, and PRIESTLEY'S works on Mexico, WIESSE'S on Peru, and WASHBURN'S on Paraguay. Material in English upon the missions in the north is to be found in the following: H. H. BANCROFT, *History of California, 1542–1890* (7 vols., San Francisco, 1884–1890); ——, *California Pastoral, 1769–1848* (San Francisco, 1887); T. H. HITTELL, *History of California* (4 vols., San Francisco, 1885–1897); Z. ENGELHART (a Franciscan), *The Franciscans in California* (Harbor Springs, Michigan, 1899); C. F. CARTER, *Missions of Nueva California* (San Francisco, 1900); H. H. BANCROFT, *History of Arizona and New Mexico* (San Francisco, 1887); ——, *History of the North Mexican States*; H. E. BOLTON, *Kino's Historical Memoir of Pimería Alta*; ——, *The Spanish Border Lands* (New Haven, 1921); CHARLES E. CHAPMAN, *The Founding of Spanish California.* For the Jesuits in Paraguay consult R. B. CUNNINGHAME GRAHAM'S *Vanished Arcadia* (London, 1901); B. CAPDEVIELLE'S *Misiones Jesuíticas en el Paraguay* (Asunción, 1923), BLAS GARAY'S *El Comunismo de las Misiones* (Asunción, 1921), and GREGORIO FUNES'S *Ensayo de la Historia Civil del Paraguay, Buenos Aires, y Tucumán* (2 vols., Buenos Aires, 1910–1911). A general work on the Church is *La Iglesia en América y la dominación española*, by LUCAS AYARRAGARAY. In N. A. N. CLEVEN'S *Readings in Hispanic American History* (Boston, 1927) are some very valuable selections bearing upon Church history. C. H. LEA'S *Inquisition in the Spanish Dependencies* (New York, 1908) is the authority on the subject. Two of the most important biographies are MACNUTT'S *Bartolomé de Las Casas* and J. GARCÍA ICAZBALCETA'S *Don Fray Juan de Zumárraga.*

VIII. ECONOMIC ACTIVITIES IN THE SPANISH COLONIES

No single work contains much material upon this subject, but CLARENCE H. HARING'S *Trade and Navigation between Spain and the Indies* (Cambridge, 1918) is perhaps of the most general use. F. DEPONS'S *Travels in South America* (2 vols., London, 1907), the writings of ALEXANDER VON HUMBOLDT (especially *Political Essay on the Kingdom of New Spain* and *Personal Narrative of Travels*), and JORGE JUAN and ANTONIO DE ULLOA'S *Voyage to South America* are also valuable for scattered material. J. A. ROBERTSON'S "Some Notes on the Transfer by Spain of Plants and Animals to its Colonies Overseas," *Studies in Hispanic-American History*, edited by W. W. Pierson (Chapel Hill, 1927), is a brief but helpful study. For individual countries the best material is to be obtained from the early chapters of the histories dealing with the countries. Among these are: HERBERT I. PRIESTLEY, *The Mexican Nation: a History* (New York, 1923); H. H. BANCROFT, *History of Mexico* (6 vols., San Francisco, 1883–1888); ——, *History of Central America* (San Francisco, 3 vols., 1882–1887); ALFONSO TORO, *Compendio de Historia de México* (4 vols., Mexico, 1926); LUIS GALDAMES, *Estudio de la Historia de Chile* (sixth edition, Santiago, 1925); DIEGO BARROS ARANA, *Historia Jeneral de Chile* (16 vols., Santiago, 1884–1902); RICARDO LEVENE, *Historia Argentina* (2 vols., Buenos Aires, 1925); MARIANO A. PELLIZA, *Historia Argentina desde su origen hasta la organización nacional* (2 vols., Buenos Aires, 1910); H. D. (HERMANO DAMASCENO), *Ensayo de la Historia Patria* (Montevideo, 1923), dealing

with Uruguay; CARLOS WIESSE, *Historia del Peru* (4 vols., Lima, 1926); R. M. BARALT, *Historia Antigua de Venezuela*; and IRENE ALOHA WRIGHT, *Early History of Cuba* (New York, 1916). See also BERNARD MOSES's *South America on the Eve of Emancipation* (New York, 1908), E. G. BOURNE's *Spain in America*, and other general works.

IX. EDUCATION, LEARNING, AND THE FINE ARTS IN THE INDIES

The best single work on the general field is VICENTE G. QUESADA's *La Vida Intelectual en la América Española durante los Siglos XVI, XVII, y XVIII* (Buenos Aires, 1917). See also the larger general works on the colonial period, the histories treating of individual countries listed for Chapters XVI to XXIX, inclusive, and *South America on the Eve of Emancipation*, *Spain's Declining Power in South America*, and *The Intellectual Background of the Revolution in South America*, all by BERNARD MOSES. The following special works are valuable: LILLIAN ESTELLE FISHER, *Viceregal Administration in the Spanish-American Colonies* (Berkeley, 1926); MANUEL G. REVILLA, *El Arte en Mexico* (second edition, Mexico, 1923); MARCELINO MENÉNDEZ Y PELAYO, *Historia de la Poesía Hispano-Americana* (2 vols., Madrid, 1911); BERNARD MOSES, *Spanish Colonial Literature in South America* (New York, 1922); ALFRED COESTER, *The Literary History of Spanish America* (New York, 1916); JOSÉ GABRIEL NAVARRO, "Art in Ecuador," *Bulletin of the Pan-American Union*, August, 1925; and FRANK H. G. KREEBLE, "The Colonial Art of Quito," *International Studio*, December, 1922.

X. SPANISH COLONIAL SOCIETY

See works by DEPONS, HUMBOLDT, JUAN and ULLOA listed for Chapter VIII and general histories for countries mentioned for Chapters XVI to XXIX inclusive. See also the following: BERNARD MOSES, *Establishment of Spanish Rule*; ——, *South America on the Eve of Emancipation*; ——, *Spain's Declining Power in South America*; ——, *The Intellectual Background of the Revolution in South America*; C. O. BUNGE, *Nuestra América: ensayo de psicología social* (fourth edition, Buenos Aires, 1912); É. RÉCLUS, *The Earth and its Inhabitants: South America*; C. H. HARING, *Trade and Navigation between Spain and the Indies* (Cambridge, 1918); C. A. VILLANUEVA, *Resumen de la historia de América*; WILLIAM LYTLE SCHURZ, "Mexico, Peru, and the Manila Galleon," *Hispanic-American Historical Review*, November, 1918; FRANCIS BOND HEAD, *Rough Notes taken during some Rapid Journeys across the Pampas and among the Andes* (new edition, London, 1861); SEBASTIÁN LORENTE, *Historia del Perú, bajo la Dinastía Austriaca, 1542–1598* (Lima, 1863).

XI. COLONIAL DEVELOPMENT OF BRAZIL

General accounts may be found in R. G. WATSON's *Spanish and Portuguese South America*, THOMAS C. DAWSON's *South American Republics*, CARLOS NAVARRO Y LAMARCA's *Compendio de la Historia General de América*, and DIEGO BARROS ARANA's *Historia de América*. See also references for history of Portugal listed for Chapter III. The most comprehensive work in English dealing with the

Brazilian colonial period is Robert Southey's *History of Brazil* (3 vols., London, 1810–1819). John Armitage's *History of Brazil, 1808–1831* (2 vols., London, 1836) is a continuation of Southey's work. The following works in Portuguese are valuable: F. A. de Varnhagen, *Historia geral do Brasil*; João Ribeiro, *Historia do Brasil* (fifth edition, Rio de Janeiro, 1914); Rocha Pombo, *Historia do Brasil* (*seventh edition, São Paulo*, 1918); ——, *Historia do São Paulo* (second edition, São Paulo, 1923). See also these: Manoel de Oliveira Lima, *The Evolution of Brazil compared with that of Spanish and Anglo-Saxon America*, edited by Percy A. Martin; ——, *Formation historique de la nationalité brésilienne* (Paris, 1911); ——, *Dom João VI do Brasil*; Percy A. Martin, "Minas Gerães and California: a Comparison of Certain Phases of their Historical and Social Evolution," *Revista do Instituto Historico e Geographico Brasileiro*, special volume, Rio de Janeiro, 1925; Henry Koster, *Travels in Brazil* (2 vols., London, 1817); John Mawe, *Travels in the Interior of Brazil* (London, 1812); Isaac Goldberg, *Brazilian Literature* (New York, 1922).

XII. THE RISE AND FALL OF SAINT-DOMINGUE

The best account of the old régime in Saint-Domingue is a contemporary one, M. L. E. Moreau de Saint-Méry's *Description topographique, physique, civil, politique, et historique de la partie française de l'île Saint-Domingue* (second edition, Paris, 1875). Two valuable special works treating of the downfall of the colony are Herbert Elmer Mills's *Early Years of the French Revolution in San Domingo* (Poughkeepsie, c. 1892) and T. Lothrop Stoddard's *French Revolution in Santo Domingo* (Boston, 1913). J. C. Dorsainvil's *Manuel d'histoire d'Haiti* (Port-au-Prince, 1925) gives a brief treatment from the Haitian standpoint. See also Marcus Rainsford's *Historical Account of the Black Empire of Hayti: comprehending a View of the Principal Transactions in the Revolution of Saint Domingo; with its Antient and Modern State* (London, 1805) and B. Ardouin's *Études sur l'histoire d'Haiti, suivies de la vie du Général J. M. Borgella* (Paris, 1855).

XIII. THE WARS FOR HISPANIC-AMERICAN INDEPENDENCE

See general works dealing with the colonial period and also histories of individual countries listed for Chapters XVI to XXIX.

Spanish Colonies. The following are valuable studies: William Spence Robertson, *The Rise of the Spanish-American Republics as Told in the Lives of their Liberators* (New York, 1918); ——, "Francisco de Miranda and the Revolutionizing of Spanish America," Report of the American Historical Association, 1907, Vol. I (Washington, 1909); ——, *The Life of Miranda* (2 vols., Chapel Hill, 1929); Bernard Moses, *The Intellectual Background of the Revolution in South America, 1810–1824* (New York, 1926); ——, *South America on the Eve of Emancipation* (New York, 1908); ——, *Spain's Declining Power in South America, 1730–1806*; Frederic L. Paxson, *The Independence of the South American Republics* (Philadelphia, 1903); Alfred Hasbrouck, *Foreign Legionaries in the Liberation of Spanish South America* (New York, 1928); Bartolomé Mitre, *The Emancipation of South America*, being a condensed translation by William Pilling of

the *History of San Martín*, by Don Bartolomé Mitre (London, 1893); Arthur Howard Noll and A. Philip McMahon, *The Life and Times of Miguel Hidalgo y Castilla* (Chicago, 1910); F. L. Petre, *Simón Bolívar, "El Libertador"* (London, 1909); J. Mancini, *Bolívar et l'émancipation des colonies espagnoles des origines à 1815* (Paris, 1912); Henry R. Lemly, *Bolívar, Liberator* (Boston, 1927); H. L. Decoudray-Holstein, *Memoirs of Simón Bolívar* (2 vols., London, 1830); F. Larrazábal, *The Life of Simón Bolívar, Liberator of Colombia and Peru, Father and Founder of Bolivia*; Bartolomé Mitre, *Historia de Belgrano* (5 vols.); ——, *Historia de San Martín y de la emancipación sud-americana* (3 vols.); J. Maeso, *Artigas y su época*; Manuel Moreno, *Vida y Memorias del Mariano Moreno* (Buenos Aires, 1918); Mariano Moreno, *Escritos politicos y economicos* (Buenos Aires, 1915).

Brazil. John Armitage, *The History of Brazil* (2 vols., London, 1836); Manoel de Oliveira Lima, *Evolution of Brazil*; ——, *Formation historique de la nationalité brésilienne*; ——, *Dom João VI do Brasil* (2 vols., Rio de Janeiro, 1908); João Ribeiro, *Historia do Brasil* (Rio de Janeiro, 1914); R. Walsh, *Notices of Brazil, in 1828 and 1829* (2 vols., London, 1830); J. M. Pereira da Silva, *Historia da fundacão do imperio brazileiro* (3 vols.).

XIV. THE END OF SPANISH RULE IN AMERICA

The following deal with colonial conditions in the nineteenth century: Richard Henry Dana, *To Cuba and Back: a Vacation Voyage* (Boston, c. 1859); George D. Flinter, *An Account of the Present State of Puerto Rico* (London, 1834); David Turnbull, *Travels in the West: Cuba; with Notices of Porto Rico and the Slave Trade* (London, 1840). Willis Fletcher Johnson's *History of Cuba* (5 vols., New York, 1920) gives a fairly detailed and dependable treatment of the colonial period, but is of little use for the history of the republic. A good but brief account is included in Charles E. Chapman's *History of the Cuban Republic: a Study in Hispanic-American Politics* (New York, 1927). Two other general works are M. M. Ballou's *History of Cuba* and I. E. Canini's *Four Centuries of Spanish Rule in Cuba*. R. G. Caldwell's *López Expeditions to Cuba, 1848–1851* is a detailed study. Two books on the most important diplomatic relations are James Morton Callahan's *Cuba and International Relations* (Baltimore, 1899) and E. J. Benton's *International Law and Diplomacy of the Spanish-American War*. Among the best works dealing with the Cuban War for Independence are J. H. Clark's *Cuba and her Fight for Freedom*, Henry Cabot Lodge's *Spanish-American War*, E. A. Flores's *La Guerra de Cuba*, Gonzálo de Quesada's *War in Cuba*, Grover Flint's *Marching with Gómez* (Boston, 1899), and F. E. Chadwick's *Relations of the United States and Spain* (3 vols.). The last listed is the standard history of the Spanish-American War; the first volume of it is on diplomatic relations.

XV. PROBLEMS OF INDEPENDENCE

Among the best works on recognition of the Latin-American countries and the Monroe Doctrine are the following: William R. Manning, *Diplomatic Correspondence of the United States concerning the Independence of the Latin-American*

Countries (3 vols., New York, 1925); JOHN BASSETT MOORE, *Digest of International Law*, Vol. VI; WILLIAM SPENCE ROBERTSON, *Hispanic-American Relations with the United States* (New York, 1923); ——, "The First Legations of the United States in Latin America," *Mississippi Valley Historical Review*, Vol. II; ——, "The Monroe Doctrine Abroad in 1823–1824," *American Political Science Review*, Vol. VI; ——, "The Recognition of the Hispanic-American Nations by the United States," *Hispanic-American Historical Review*, August, 1918; ——, "The Recognition of the Spanish Colonies by the Mother Land," ibid., 1918; ——, "South America and the Monroe Doctrine," *Political Science Quarterly*, 1915; WILLIAM R. SHEPHERD, "Bolívar and the United States," *Hispanic-American Historical Review*, August, 1918; J. LLOYD MECHAM, "The Papacy and Spanish-American Independence," ibid., May, 1929; W. P. CRESSON, *The Holy Alliance*; JOHN H. LATANÉ, *The United States and Latin America* (New York, 1920); T. H. MAHONEY, *The Monroe Doctrine*; DEXTER PERKINS, *The Monroe Doctrine, 1823–1826* (Cambridge, 1927); J. FRED RIPPY, *Latin America in World Politics* (New York, 1928); ——, *Rivalry of the United States and Great Britain over Latin America, 1808–1830* (Baltimore, 1829); GRAHAM HENRY STUART, *Latin America and the United States* (New York, 1922).

For discussion of the efforts to form protective alliances the best work is JOSEPH BYRNE LOCKEY'S *Pan-Americanism: its Beginnings* (New York, 1920), which contains a bibliography. See also P. A. ZUBIETA'S *Congresos de Panamá y Tacubaya, breves datos para la historia diplomática de Colombia* and S. G. INMAN'S *Problems in Pan-Americanism* (New York, 1921).

The governmental problems facing the new Latin-American states are treated in the following works: F. GARCÍA CALDERÓN, *Latin America: its Rise and Progress*, translated by BERNARD MAILL (London, 1913); JAMES BRYCE, *Modern Democracies* (2 vols., New York, 1921); E. LARRABURE Y UNANUE, "The Monarchical Plans of General San Martín," *The Pacific Ocean in History*, edited by H. Morse Stephens and Herbert Eugene Bolton (New York, 1917); BASIL HALL, *Extracts from a Journal written on the Coasts of Chili, Peru, and Mexico, in the Years 1820, 1821, 1822* (Edinburgh, 1824); MARY WILHELMINE WILLIAMS, "The Political Problems of Hispanic America: their Origin and Nature," *South Atlantic Quarterly*, January, 1922.

XVI. HAITI

The best general work dealing with the history of Haiti is probably H. P. DAVIS'S *Black Democracy: the Story of Haiti* (New York, 1928), which shows understanding as well as scholarship. J. C. DORSAINVIL'S *Manuel d'histoire d'Haiti* (Port-au-Prince, 1925) is a textbook, accurate as to facts, written from the Haitian point of view. J. N. LÉGER'S *Haiti: her History and her Detractors* (New York, 1928) is also a work by a Haitian, and is somewhat biased. Among earlier writings of value are JAMES FRANKLIN'S *Present State of Haiti* (London, 1828), CHARLES MACKENZIE'S *Notes on Haiti, made during a Residence in that Republic* (London, 1830), PAUL DHORMOYS'S *Une visite chez Soulouque* (Paris, 1864), and M. B. BIRD'S *Republic of Haiti and its Struggles* (London, 1867?). Bird was a Wesleyan missionary who spent many years in Haiti. His book is the most useful of the four listed. PRINCE SANDERS'S *Haytian Papers* (London, 1816) are of interest. L. J. Marcelin's *Haiti, ses guerres civiles* (Paris, 1892) is a sound treatment with emphasis upon economic aspects. Spencer St. John's *Haiti* (London, 1889) is an account by one who was long British minister to Haiti. The following throw light upon the present American intervention in Haiti: Chester Lloyd Jones, *Caribbean Interests of the United States* (New York, 1916); Graham Henry Stuart, *Latin America and the United States* (New York, 1922); Emily Greene Balch and others, *Occupied Haiti* (New York, 1927); Charles E. Chapman, "The Development of Intervention in Haiti," *Hispanic-American Historical Review*, August, 1927; A. C. Millspaugh, "Our Haitian Problem," *Foreign Affairs*, July, 1929; Report of the McCormick Committee, United States Senate, Sixty-seventh Congress, Second Session, Report No. 794; and annual reports of the American chiefs of departments and of the high commissioner. A useful collection of Haitian poetry, *Anthologie d'un Siècle de Poésie haïtienne, 1817–1925* (Paris, 1925), has been compiled by Louis Morpeau.

XVII. THE DOMINICAN REPUBLIC

The material on the Dominican Republic is very meager. Perhaps the best general work is Sumner Welles's *Naboth's Vineyard: the Dominican Republic, 1844–1924* (2 vols., New York, 1928); but Otto Schoenrich's *Santo Domingo: a Country with a Future* (New York, 1918) and the sketch in Carlos Pereyra's *Historia de la América Española*, Vol. V, are very useful. Bernardo Pichardo's *Resumen de Historia Patria* (Barcelona, 1922) is an elementary textbook of value for the Dominican point of view. Samuel Hazard's *Santo Domingo, Past and Present; with a Glance at Haiti* (New York, 1873) is a valuable work; it describes the country at the time when annexation to the United States was under discussion. On the question of annexation see also the collection of documents, *Annexation of San Domingo* (New York, 1870), Report of the Commission of Inquiry to Santo Domingo, Senate Executive Documents, No. 9, Forty-second Congress, First Session, and the following: J. H. Hollander, Report on the Debt of Santo Domingo, Senate Executive Documents, Fifty-ninth Congress, First Session, 1907; C. Kelsey, "The American Intervention in Haiti and Santo Domingo," *Annals of the American Academy of Political and Social Science*, March, 1922; A. Orzábal Quintana, *El imperialismo yanqui en Santo Domingo*; Max Henríquez Ureña, *Los Estados Unidos en la República Dominicana*; Melvin M. Knight, *The Americans in Santo Domingo* (New York, c. 1928). An interesting article on Eugenio María de Hostos, by Isabel Sharpe Shepherd, appears in the *Bulletin of the Pan-American Union* for June, 1925.

XVIII. CUBA

The best book on independent Cuba is Charles E. Chapman's *History of the Cuban Republic: a Study in Hispanic-American Politics* (New York, 1927); it contains an extensive critical bibliography. Other excellent works are Rafael Martínez Ortiz's *Cuba: los primeros años de independencia* (2 vols., Paris, 1921), Fernando Ortiz's *La decadencia cubana* (Habana, 1924), Carlos Manuel Trelles's *El progreso (1902 a 1905) y el retroceso (1906 a 1922) de la república de Cuba* (Habana, 1923); and Irene Aloha Wright's *Cuba* (New York, 1910).

Ramiro Guerra y Sanchez's *Historia de Cuba* (Habana, 1922) is a Cuban school text with little space given to the national period, but it is useful as showing the Cuban attitude toward the United States. There is a good brief sketch in Carlos Pereyra's *Historia de la América Española*, Vol. V. Leland Hamilton Jenks's *Our Cuban Colony* (New York, c. 1928) has a prejudiced tone toward the United States. William Belmont Parker's *Cubans of Today* (New York, 1919) is a useful volume. For diplomatic discussion see the works on United States relations with Latin America by C. K. Jones, Latané, and Stuart, and also Elihu Root's *Military and Colonial Policy of the United States* (Cambridge, 1916).

XIX. CENTRAL AMERICA

The best single work is Dana G. Munro's *Five Republics of Central America, their Political and Economic Development and their Relations with the United States* (New York, 1918). See also the following: Alcée Fortier and John Rose Ficklen, *Central America and Mexico* (Philadelphia, c. 1907); Mary Wilhelmine Williams, *Anglo-American Isthmian Diplomacy* (Washington, 1916); ——, "The Ecclesiastical Policy of Francisco Morazán and the Other Central American Liberals," *Hispanic-American Historical Review*, May, 1920; E. G. Squier, *Nicaragua, its People, Scenery, Monuments, and the Proposed Interoceanic Canal* (2 vols., New York, 1852); John L. Stephens, *Incidents of Travel in Central America, Chiapas, and Yucatan* (New York, 1841); William V. Wells, *Explorations and Adventures in Honduras*; Henry Dunn, *Guatimala, or the United Provinces of Central America, in 1827–1828* (New York, 1828); Manuel Montúfar, *Memorias para la Historia de la Revolución de Centro-América por un Guatemalteco* (Jalapa, 1832); Carl Scherzer, *Wanderungen durch die Mittel-Americanischen Freistaaten Nicaragua, Honduras, und San Salvador* (Braunschweig, 1857); G. A. Thompson, *Narrative of an Official Visit to Guatemala* (London, 1829); Lorenzo Montúfar and Rivera Maestre, *Reseña historica de Centro América* (5 vols., Guatemala, 1878); Hubert Howe Bancroft, *History of Central America* (3 vols.); Frederick Crowe, *The Gospel in Central America* (London, 1850); Isaac Joslin Cox, *Nicaragua and the United States* (World Peace Foundation Pamphlets, Vol. X, No. 7, Boston, 1927); Carlos Pereyra, *Historia de la América Española*, Vol. V; Henry Lewis Stimson, *American Policy in Nicaragua* (New York, 1927); Rafael de Nogales y Mendez, *The Looting of Nicaragua* (New York, 1928); and Philip K. Reynolds, *The Banana* (New York, 1927).

XX. MEXICO: EMPIRE AND REPUBLIC

The best general work on Mexican history is Herbert Ingram Priestley's *Mexican Nation, a History* (New York, 1923). Fortier and Ficklen's *Central America and Mexico* is a brief account. H. H. Bancroft's *History of Mexico* (6 vols.) contains much valuable but undigested material. Volume III of *Historia de la América Española*, by Carlos Pereyra, a Mexican, gives a good brief treatment. Other important works by Mexicans are Luis Alamán's *Historia de Mejico desde los primeros movimientos que prepararon su independencia* (2 vols., Mexico, 1836–1838) and I. Álvarez's *Estudios sobre la historia general de México* (6 vols., Zacatecas, 1869–1877). The following works dealing with foreign relations are by authorities upon the subjects treated: G. B. Rives, *The United States and Mexico, 1821–1848* (2 vols., New York, 1919); Justin H. Smith, *The War with Mexico* (2 vols., New York, 1923); Paul Neff Garber, *The Gadsden Purchase* (Philadelphia, 1923); James Fred Rippy, *The United States and Mexico* (New York, 1926); Charles W. Hackett, *Mexican Relations with the United States* (1926). Two interesting personal accounts on the era of Santa Anna are Joel Poinsett's *Notes on Mexico* and F. E. Calderón de la Barca's *Life in Mexico*. The article "Secessionist Diplomacy of Yucatán" by Mary Wilhelmine Williams, in *Hispanic-American Historical Review* for May, 1929, is a special study. For early relations with the Church and the War of the Reform see Wilfrid Hardy Callcott's *Church and State in Mexico, 1822–1857* (Durham, c. 1926) and U. R. Burke's *Life of Benito Juárez* (London, 1904). For the French intervention and the Second Empire the latter is of value, as are also A. H. Noll's *From Empire to Republic*, J. M. Callahan's *Evolution of Seward's Mexican Policy*, and Sarah Y. Stevenson's *Maximilian in Mexico: a Woman's Reminiscences of the French Intervention* (New York, 1899) and *Memorandum sobre el proceso del Archiduque Fernando Maximiliano* (Mexico, [1867]). The works on the Díaz régime are on the whole rather superficial, but Chester L. Jones's *Mexico and its Reconstruction* (New York, 1921) is a careful study with a bibliography. Among other useful writings on the period are D. Hannay's *Díaz* (New York, 1917), which is critical of Díaz; J. Creelman's *Díaz, Master of Mexico* (New York, 1912), favorable to the dictator; and J. K. Turner's *Barbarous Mexico*. Two useful books giving light upon social conditions at the opening of the Díaz rule are Gilbert Haven's *Our Next-Door Neighbor: a Winter in Mexico* (New York, 1875) and Antonio García Cubas's *Republic of Mexico in 1876* (Mexico, 1876). Much has been written upon the revolutionary period since 1910. Among the most useful are the following: Ernest Gruening, *Mexico and its Heritage* (New York, 1928); Edward A. Ross, *The Social Revolution in Mexico* (New York, 1923); Carleton Beals, *Mexico: an Interpretation* (New York, 1923); Moises Sáenz and Herbert I. Priestley, *Some Mexican Problems* (Chicago, 1926); J. F. Rippy, José Vasconcelos, and Guy Stevens, *Mexico before the World* (Chicago, 1928); and Joseph E. Sterrett and Joseph S. Davis, *The Fiscal and Economic Condition of Mexico* (1928), which is a report, with supplement, submitted to the International Committee of Bankers on Mexico.

XXI. NEW GRANADA, OR COLOMBIA, AND PANAMA

No adequate history of Colombia exists in English. The most comprehensive accounts are perhaps to be found in Thomas C. Dawson's *South American Republics*, Charles E. Akers's *History of South America*, A. J. Deberle's *History of Spanish America*, and J. Eder's *Colombia* (New York, 1913). García Calderón's *Latin America: its Rise and Progress*, W. L. Scruggs's *Colombian and Venezuelan Republics* (Boston, 1910), and H. J. Mozans's *Up the Orinoco and down the Magdalena* (New York, 1910) are also valuable. Two elementary histories—Jesus María Henao and Gerardo Arrubla's *Compendio de la Historia de Colombia* (Bogotá, 1926) and Cayo Leonidas Penuela's *Nuevo Curso de Historia de Colombia* (Friburgo de Brisgovia, 1909)—are useful, especially in view of the dearth of material. In Carlos Pereyra's *Historia de la América Española*, Vol. VI, is a good survey. The large work by GUSTAVO ARBOLEDA, *Historia Contemporánea de Colombia* (2 vols., Bogotá, 1928), covers only twenty years—1829 to 1849. For relations with the United States the following will be found helpful: J. H. LATANÉ, *The United States and Latin America*; G. H. STUART, *Latin America and the United States*; H. C. HILL, *Roosevelt and the Caribbean* (Chicago, 1927); and SAMUEL FLAGG BEMIS (Editor), *American Secretaries of State and their Diplomacy* (10 vols., New York, 1927–1929). W. REGINALD WHEELER and WEBSTER E. BROWNING'S *Modern Missions on the Spanish Main* (Philadelphia, 1925) gives considerable information about the Roman Church in Colombia.

Considerable literature of varying quality exists for Panama. See especially the following: W. S. ROBERTSON, *Hispanic-American Relations with the United States* (New York, 1923); THEODORE ROOSEVELT, *Fear God and Take your Own Part* (New York, 1916); ISAAC J. COX, "The Colombian Treaty—Retrospect and Prospect," *Journal of International Relations*, April, 1921; W. F. JOHNSON, *Four Centuries of the Panama Canal* (New York, 1906); S. A. VILLEGAS, *The Republic of Panama* (Panama, 1917); P. BUNAU-VARILLA, *Creation, Destruction, and Resurrection* (New York, 1914); F. BISHOP, *Panama, Past and Present* (New York, 1916); WILLIAM C. GORGAS, *Sanitation in Panama* (New York, 1915); *Diplomatic History of the Panama Canal*, Senate Executive Documents, No. 474, Sixty-third Congress, Second Session; IRA D. TRAVIS, *The Clayton-Bulwer Treaty* (Ann Arbor, 1900); MARY WILHELMINE WILLIAMS, *Anglo-American Isthmian Diplomacy, 1815–1915* (Washington, 1916); LADY RICHMOND BROWN, *Unknown Tribes, Uncharted Seas* (London, 1924); R. H. WHITBECK, *Economic Geography of South America* (New York, 1926); and CLARENCE F. JONES, *Commerce of South America* (Boston, 1928).

XXII. VENEZUELA

Most of the best material in English is to be found in the works by DEBERLE, DAWSON, AKERS, SCRUGGS, MOZANS, LATANÉ, STUART, BEMIS (Editor), GARCÍA CALDERÓN, WHITBECK, and JONES named in connection with Chapter XXI. See also the following: LEONARD V. DALTON, *Venezuela* (London, 1912); RICHARD HARDING DAVIS, *Three Gringos in Venezuela and Central America* (London, 1896); CARLOS PEREYRA, *Historia de la América Española*, Vol. VI; FELIPE TEJERA, *Manual de Historia de Venezuela* (Caracas, 1913); JOSÉ GIL FORTOUL, *Historia Constitucional de Venezuela* (2 vols., Berlin, 1907); R. M. BARALT and R. DÍAZ, *Resumen de la Historia de Venezuela* (2 vols.); and GROVER CLEVELAND, *Presidential Problems* (New York, 1904).

XXIII. ECUADOR

See general works by DAWSON, AKERS, DEBERLE, GARCÍA CALDERÓN, PEREYRA, WHITBECK, and JONES named in connection with Chapter XXI. Also consult the following: C. REGINALD ENOCK, *Ecuador: its Ancient and Modern History, Topography, and Natural Resources, Industries, and Social Environment* (New York, 1914); P. A. BERTHE, *García Moreno, président de l'Équateur, vengeur et martyr, 1821–1875* (Paris, 1887); F. GONZÁLEZ SUÁREZ, *Historia de la República del Ecuador*; PEDRO MONCAYO, *El Ecuador de 1825 a 1875, sus hombres, sus instituciones, y sus leyes*; PASTORIZA FLORES, *History of the Boundary Dispute between*

Ecuador and Peru (New York, 1921); and Blair Niles, *Casual Wanderings in Ecuador* (New York, 1923). An unusually valuable work describing conditions in the middle of the nineteenth century is *Four Years among the South Americans* (New York, 1867), by F. Hassaurek, who was United States minister to Ecuador.

XXIV. BOLIVIA

See general works by Dawson, Deberle, Akers, García Calderón, Whitbeck, and Jones listed for Chapter XXI. Also consult the following: Carlos Pereyra, *Historia de la América Española*, Vol. VII; Paul Walle, *Bolivia: its People and its Resources, its Railways, Mines, and Rubber Forests* (New York, 1904); Alcides Arguedas, *Pueblo enfermo: contribución a la psicología de los pueblos Hispano-Americanos* (second edition, Barcelona, 1910); ——, *Histoire générale de la Bolivie*, traduite de l'espagnol, résumée, et adaptée au Français par S. Dilhan (Paris, 1923); Floriano Giebel, *Lecciones de Historia de Bolivia* (La Paz, 1920); José Macedonio Urquidi, *Nuevo Compendio de la historia de Bolivia* (La Paz, 1921); Ethel M. Crompton and Laura F. Ullrick, "Administration of José Ballivián in Bolivia," *Hispanic-American Historical Review*, November, 1918; W. B. Parker, *Bolivians of Today* (second edition, revised and enlarged, New York, 1922).

XXV. PERU

Consult the general works by Akers, Dawson, Deberle, García Calderón, Whitbeck, and Jones named in connection with Chapter XXI; also Carlos Pereyra's *Historia de la América española*, Vol. VII. See likewise Clements R. Markham's *History of Peru* (Chicago, 1892) and Carlos Wiesse's *Historia del Perú: la república* (Lima, 1926). The following are also valuable: G. H. Stuart, *The Governmental System of Peru*; F. García Calderón, *Le Pérou contemporain* (Paris, 1907); William Jefferson Dennis, *Documentary History of the Tacna-Arica Dispute* (Iowa City, 1927); E. M. Borchard, *Opinion on the Controversy between Peru and Chile known as the Question of the Pacific* (Washington, 1920); V. A. Maurtua, *The Question of the Pacific* (New York, 1901), favorable to Peru; G. Bulnes, *Chile and Peru, the Causes of the War of 1879* (Santiago, 1920), favorable to Chile; C. R. Enock, *Peru* (London, 1912); Graham H. Stuart, *The Tacna-Arica Dispute* (Boston, 1927); Percy F. Martin, *Peru in the Twentieth Century* (New York, 1911); J. A. Mozans, *Along the Andes and Down the Amazon* (London, 1912); W. B. Parker, *Peruvians of Today* (New York, 1919); A. J. Duffield, *Peru in the Guano Age* (London, 1877); T. J. Hutchinson, *Two Years in Peru* (2 vols., London, 1874).

XXVI. CHILE

Besides the accounts given in the general works by Akers, Dawson, Deberle, Whitbeck, and Jones listed for Chapter XXI, see the following general histories: Anson Uriel Hancock, *History of Chile* (Chicago, 1893); Luis Galdames, *Estudio de la historia de Chile* (sixth edition, Santiago, 1925); Carlos Pereyra, *Historia de la América Española*, Vol. VIII; Diego Barros Arana, *Historia jeneral de Chile* (16 vols., Santiago, 1884–1902). On special topics see the following: Luis

Galdames, *La evolución constitucional de Chile, 1810–1925* (Santiago, 1925–   ); Daniel Martner, *Estudio de política comercial chilena e historia económica nacional* (2 vols., Santiago, 1923); Isabel Sharpe Shepherd, "Andrés Bello," *Bulletin of the Pan-American Union*, February, 1925; Julio Banados Espinosa, *Balmaceda, su gobierno y la revolución de 1891* (2 vols., Paris, 1894); Francisco A. Encina, *Nuestra inferioridad económica, sus causas, sus consecuencias* (Santiago, 1912); L. E. Elliott, *Chile Today and Tomorrow* (New York, 1922); G. F. Scott Elliot, *Chile, its History and Development* (London, 1907); Edmond Revel Smith, *Los Araucanos*, translated by Ricardo E. Latcham (Santiago, 1914); W. Reginald Wheeler and others, *Modern Missions in Chile and Brazil* (Philadelphia, 1926); W. B. Parker, *Chileans of Today* (New York, 1920). The monthly periodical *Chile*, published in New York, contains much valuable material. For references bearing upon the War of the Pacific see the bibliography for Chapter XXV.

XXVII. PARAGUAY

Brief surveys of the history of Paraguay are to be found in the general works by Dawson, Akers, and Deberle listed for Chapter XXI; also in Volume IV of *Historia de la América Española*, by Carlos Pereyra. A more comprehensive and detailed work is C. A. Washburn's *History of Paraguay* (2 vols., 1871). The following brief works written by Paraguayans are dependable: Blas Garay, *Compendio elemental de historia del Paraguay*; Cecelio Báez, *Resumen de la historia del Paraguay desde la época de la conquista hasta el año 1880* (Asunción, 1910); ——, *Le Paraguay* (Paris, 1927). Much valuable material is to be found in Antonio Zinny's *Historia de los gobernantes del Paraguay, 1535–1887* (Buenos Aires, 1887). Of special value for information regarding recent economic development are W. Jaime Molins's *Paraguay* (Buenos Aires, 1915) and W. H. Koebel's *Paraguay* (London, c. 1917). Juan E. O'Leary's *El Mariscal Solano López* (second edition, Madrid, 1925) is an attempt to rehabilitate Francisco Solano López. J. P. and W. P. Robertson's *Letters on Paraguay: comprising an Account of a Four Years' Residence in that Republic under the Government of the Dictator Francia* (2 vols., London, 1838) is a very valuable source for the period and was used by Edward Lucas White as the historical basis for his vivid novel *El Supremo*. There is considerable first-hand material upon the Paraguayan war with the triple alliance, one of the best works being *Seven Eventful Years in Paraguay: a Narrative of Personal Experience amongst the Paraguayans* (London, 1869), by George Frederick Masterman, a British physician who was chief military apothecary for Paraguay, beginning in 1861 under Carlos López. Two good books treating of the Indians of the Chaco region are *An Unknown People in an Unknown Land* (London, 1913) and *A Church in the Wilds* (New York, 1914), both by W. Barbrooke Grubb. Biographical information on contemporary figures may be obtained from W. B. Parker's *Paraguayans of Today* (New York, 1920).

XXVIII. URUGUAY

For accounts in English the general works by Akers, Dawson, Deberle, Whitbeck, and Jones listed for Chapter XXI must be depended upon. The best general history written in Uruguay is probably *Ensayo de la Historia Patria*

(Montevideo, 1923), by H. D. (Hermano Damasceno); it is used for an advanced school text. Le Comte de Saint-Foix's *La République Orientale de l'Uruguay* (Paris, 1892) is useful. A more exhaustive work is I. De-Maria's *Compendio de la historia de la República Oriental del Uruguay* (6 vols.). C. M. Maeso's *El Uruguay a través de un Siglo* (*L'Uruguay à travers un siècle*) (Montevideo, 1910) is a centennial volume of use chiefly for information on economic matters. W. H. Koebel's *Uruguay* (New York, 1915) also contains valuable material on the same subject. A translation of the present constitution of Uruguay by Herman G. James was printed in the *Southwestern Political Science Quarterly*, Vol. I. Georges Clemenceau's *South America of Today* (New York, 1911) contains a good summary of contemporary conditions. W. B. Parker's *Uruguayans of Today* (New York, 1921). Two works by José Pedro Varela showing his educational ideas are *La Legislación Escolar* (second edition, Montevideo, 1910) and *La Educación del Pueblo* (second edition, Montevideo, 1910).

XXIX. THE ARGENTINE NATION

For historical surveys in English see the general works by Akers, Dawson, and Deberle listed for Chapter XXI. Two good brief histories by Argentines are *Historia Argentina desde su Origen hasta la Organización Nacional* (new edition, 2 vols., Buenos Aires, 1910), by Mariano A. Pelliza, and *Lecciones de Historia Argentina* (2 vols., Buenos Aires, 1925), by Ricardo Levene. L. S. Rowe's *The Federal System of the Argentine Republic* (Washington, 1921) is a scholarly work. See also Emilio Ravignant's *Historia Constitucional de la República Argentina, notas tomadas por los alumnos Luis R. Praprotink y Luciano M. Sicard* (3 vols., Buenos Aires, 1926–1927), which covers the early period of Argentine history. The following personal accounts are useful: Charles Darwin, *Voyage of the Beagle* (Harvard Classics, New York, c. 1909); W. H. Hudson, *Far Away and Long Ago: a History of my Early Life* (New York, 1918); Benjamin Franklin Bourne, *The Captive in Patagonia; or Life among the Giants, a Personal Narrative* (Boston, 1853); Charles Salisbury, *My Life in the Argentine Republic* (London, 1917); and Charles S. Stewart, *Brazil and La Plata: the Personal Record of a Cruise* (New York, 1856). Among numerous good special works treating largely of political history are the following: Andrés Lama, *Rivadavia, su Obra Política y Cultural* (Buenos Aires, 1912); Manuel Bilboa, *Historia de Rosas* (Buenos Aires, 1919); Ernesto Quesada, *La Época de Rosas, su Verdadero Carácter Histórico* (Buenos Aires, 1898); José María Ramos Mejía, *Rosas y su Tiempo* (second edition, 3 vols., Buenos Aires, 1907); Domingo F. Sarmiento, *Facundo* (third edition, Buenos Aires, 1925); Bartolomé Mitre, *Ensayos Históricos* (Buenos Aires, 1918); Alejandro Magariños Cervantes, *Estudios Históricos, Políticos, y Sociales de la Plata* (Paris, 1854); Martín García Mérou, *Alberdi; Ensayo Crítico* (Buenos Aires, 1916); J. Guillermo Guerra, *Sarmiento, su Vida y sus Obras* (Santiago de Chile, 1901). The article "The Treaty of Tordesillas and the Argentine-Brazilian Boundary Settlement," by Mary Wilhelmine Williams, in *Hispanic-American Historical Review* for February, 1922, supplements briefer accounts given in books. The following works deal chiefly with economic topics: Mark Jefferson, *Peopling the Argentine Pampa* (American Geographical Society, Research Series No. 16, New York, 1926); Enrique Dickman, "Inmigración y Latifundia," in *Revista Argentina de Ciencias Políticas*, Vol. X, No. 56; JULES HURET, *La Argentina del Plata a la Cordillera de los Andes*, translated by E. Gómez Carrillo (Paris, n. d.); ——, *En Argentine, de Buenos Aires au Gran Chaco* (Paris, 1912); and W. B. PARKER, *Argentines of Today* (2 vols., New York, 1920).

XXX. BRAZIL: EMPIRE AND REPUBLIC

The best general history on Brazil in English is perhaps HERMAN G. JAMES'S *Brazil after a Century of Independence* (1925); J. ARMITAGE'S *History of Brazil* treats only the early period, to the end of the reign of Pedro I. Brief accounts in English are included in the works by AKERS, DAWSON, and DEBERLE listed for Chapter XXI. The following short histories written in Portuguese are useful: JOÃO RIBEIRO, *Historia do Brasil* (fifth edition, Rio de Janeiro, 1914); ROCHA POMBO, *Historia do Brasil* (seventh edition, São Paulo, 1918); ——, *Historia do São Paulo* (second edition, São Paulo, 1923). More exhaustive and scholarly works by Brazilians are FRANCISCO ADOLFO DE VARNHAGEN'S *Historia Geral do Brasil* and C. M. PINHEIRO'S *Historia do Brasil.* The three following works by MANOEL DE OLIVEIRA LIMA are stimulating as well as illuminating: *The Evolution of Brazil compared with that of Spanish and Portuguese America; Formation historique de la nationalité brésilienne*; and *Aspectos da Historia e da Cultura do Brasil* (Lisboa, 1923). An important special work by a Brazilian is JOAQUIM NABUCO'S *Un Estadista do Imperio: Nabuco de Araujo, sua Vida, suas Opiniões, su Epoca* (3 vols., Paris, 1898–1900). An interesting and valuable study of the constitution is HERMAN G. JAMES'S *Constitutional System of Brazil* (Washington, 1923). B. MOSSÉ'S *Dom Pedro II, Empereur du Brésil* (Paris, 1889) though frankly eulogistic and rather superficial, is useful. The following works based upon personal observation are very interesting as well as valuable: R. WALSH, *Notices of Brazil in 1828 and 1829*; W. S. W. RUSCHENBERGER, *Three Years in the Pacific, containing Notices of Brazil, Chile, Bolivia, Peru, etc.* (London, 1835); DANIEL P. KIDDER, *Sketches of Residence and Travels in Brazil* (2 vols., Philadelphia, 1845); DANIEL P. KIDDER and J. C. FLETCHER, *Brazil and the Brazilians* (Philadelphia, 1857); THOMAS EWBANK, *Life in Brazil; or, a Journal of a Visit to the Land of the Cocoa and the Palm* (New York, 1856); PROFESSOR and MRS. LOUIS AGASSIZ, *A Journey to Brazil* (Boston, 1868); J. B. DEBRET, *Voyage Pittoresque et Historique au Brésil* (2 vols., Paris, 1834); THEODORE ROOSEVELT, *Through the Brazilian Wilderness* (New York, 1914). Kidder and Fletcher were Protestant missionaries. Works dealing directly with evangelical missions are SAMUEL R. GAMMON'S *Evangelical Invasion of Brazil* (Richmond, Virginia, c. 1910) and *Modern Missions in Chile and Brazil*, by W. REGINALD WHEELER and others. The following treat of immigration of "Confederates" from the United States of America to Brazil: BALLARD S. DUNN, *Brazil, a Home for Southerners* (New York, 1866); J. McT. GASTON, *Hunting a Home in Brazil* (Philadelphia, 1867); LAWRENCE F. HILL, "Confederate Exiles in Brazil," *Hispanic-American Historical Review*, May, 1927; PERCY ALVIN MARTIN, "Causes of the Collapse of the Brazilian Empire," *Revista do Instituto Historico e Geographico Brasileiro* (Congresso Internacional de Historia da America), tomo especial, Rio de Janeiro, 1925; MARY WILHELMINE WILLIAMS, "The Treatment of Negro Slaves in the Brazilian Empire: a Comparison with the United States of America," ibid.

XXXI. LATIN-AMERICAN SOCIAL EVOLUTION SINCE 1825

The following contain considerable material upon social conditions: Georges Clemenceau, *South America Today*; Edward Alsworth Ross, *South of Panama* (New York, 1915); Clayton Sedgwick Cooper, *Understanding South America* (New York, 1918); W. J. Holland, *To the River Plate and Back* (New York, 1913); Webster E. Browning, *El Congreso sobre Obra Cristiana en Sud América* (Montevideo, 1926); Homer C. Stuntz, *South American Neighbors* (New York, 1916); Robert E. Speer, *South American Problems* (New York, 1917). See also works by Squier, Stephens, Wells, Scherzer, and Thompson listed for Chapter XIX, those by Huret listed for Chapter XXIX, and those by Walsh, Ruschenberger, Kidder, Kidder and Fletcher, Ewbank, Professor and Mrs. Agassiz, Debret, Roosevelt, Dunn, and Gaston listed for Chapter XXX. C. O. Bunge's *Nuestra América: Ensayo de psicología social* (fourth edition, Buenos Aires, 1912), though sweeping in statement, is very valuable, as is also Augustín Álvarez's *La Herencia Moral de los Pueblos Hispano-Americanos* (Buenos Aires, 1912). On the status of women some material will be found in E. A. Ross's *South of Panama* and in Ernest Gruening's *Mexico and its Heritage*. See also Mary Wilhelmine Williams's article "Education of Women in Latin America," in *Journal of the American Association of University Women*, October, 1927; ——, "Altruistic Activities of Latin American Women," ibid., April, 1928; "Homenaje a Paulina Luisi," *Acción Feminina* No. 51; and "D. Bertha Lutz: Homenagem das Senhoras Brasileiras a illustre Presidente da Union interamericana de Mulheres" (Rio de Janeiro, 1925). For information upon work on sanitation in Latin America see annual reports of the Rockefeller Foundation and "Traços de Oswaldo Cruz" by Ezequiel Caetano Dias in *Memorias do Instituto Oswaldo Cruz*, Vol. XV.

XXXII. LITERATURE AND ART IN HISPANIC AMERICA

Literature. The following are good and are practically the only works in English treating of Hispanic-American literature: Alfred Coester, *The Literary History of Spanish America* (New York, 1916); Isaac Goldberg, *Studies in Spanish American Literature* (New York, 1920); ——, *Brazilian Literature* (New York, 1922). The first and third of these volumes contain bibliographies. See also articles in Warner's *Library of the World's Best Literature*, Vol. XV. Two good volumes in Spanish on Hispanic-American intellectual and literary development are Marcelino Menéndez y Pelayo's *Historia de la Poesía Hispano-Americana* (2 vols., Madrid, 1911) and Martín García Mérou's *El Brazil Intelectual: Impresiones y Notas Literarias* (Buenos Aires, 1900). The following are among the most available and valuable anthologies: *Antología Americana* (Barcelona, 1897); Michael A. de Vitis, *Florilegio del Parnaso Americano* (Barcelona, n.d.); and Alfred Coester, *Anthology of the Modernista Movement in Spanish America.* Elijah Clarence Hills's *Odes of Bello, Olmedo, and Heredia* (New York, 1920) includes a critical essay as well as a number of the best poems of the writers mentioned. Good translations of representative Spanish-American poetry may be found in *Some Spanish-American Poets*, translated by Alice Stone Blackwell (New York, 1929).

Art. The following will be helpful: R. H. LAMBORN, *Mexican Paintings and Painters*; ANITA BRENNER, *Idols behind Altars* (New York, 1929); JORGE MANACH, "La Pintura en Cuba," in *El Arte y la Literatura en Cuba*, Vol. I (Habana, 1925); MARY A. BURNET, "Art from the Argentine," *International Studio*, September, 1923; JOSÉ JUAN TABLADA, "Mexican Painting of Today," ibid., January, 1923; "The Latin American Artist in the Art Galleries of the United States," *Bulletin of the Pan-American Union*, December, 1922; "Treasure Trove in Argentina's National Art Gallery," ibid., September, 1924; JOSÉ GABRIEL NAVARRO, "Art in Ecuador," ibid., August, 1925; "Hispano-American Art and Artists," ibid., April, 1926; ALEJANDRO FUENZALIDA GRANDON, "The Fine Arts in Chile," *Chile*, February, 1929; ——, "Chile, a Nation of Great Sculptors," ibid., March, 1929. The periodicals *Mexican Folkways* and *Forma*, published in Mexico City are helpful.

XXXIII. REGIONAL GROUPINGS AND WORLD RELATIONSHIPS OF LATIN AMERICA

One of the best and most comprehensive works bearing upon this topic is WILLIAM SPENCE ROBERTSON'S *Hispanic-American Relations with the United States* (New York, 1923). For material specifically treating diplomatic relations see works by LATANÉ, RIPPY, PERKINS, LOCKEY, and STUART listed for Chapter XV; also *The American Secretaries of State* (10 vols., New York, 1927–1929), edited by BEMIS; J. B. LOCKEY'S *Pan-Americanism: its Beginnings*; and ELIHU ROOT'S *Latin America and the United States* (Cambridge, 1917). On the Pan-American Union see JOHN BARRETT'S *Pan-American Union: Peace, Friendship, Commerce* (Washington, 1911), the annual reports of the director-general, and the *Proceedings* of the Pan-American conferences. On business relations between the United States and Latin America see C. L. CHANDLER'S *Inter-American Acquaintances* (Sewanee, 1917), N. FILSINGER'S *Trading with Latin America* (New York, 1917), W. S. CULBERTSON'S *International Economic Policies* (1925), C. S. COOPER'S *Latin America—Men and Markets* (Boston, 1927), CLARENCE F. JONES'S *Commerce of South America* (Boston, 1928), and B. H. WILLIAMS'S *Economic Foreign Policy of the United States* (New York, 1929). *Latin America and the War* (Baltimore, 1925), by PERCY ALVIN MARTIN, is very valuable for the subject of its title. For relations of Latin America to the League of Nations see reports upon League meetings and activities. The following treat of the tendency to misunderstanding between the United States and Latin America: SAMUEL GUY INMAN, *Problems in Pan-Americanism* (New York, c. 1921); TANCREDO PINOCHET, *The Gulf of Misunderstanding; or North and South America as seen by Each Other* (New York, c. 1920); MARY WILHELMINE WILLIAMS, "Latin Fears and Yankee Favors," *American Mercury*, March, 1928; C. H. HARING, *South America looks at the United States* (New York, 1928). On intellectual contacts a little recent material is to be found in the article "Intellectual Relationships between the United States and Latin America," by MARY WILHELMINE WILLIAMS, in *Journal of the American Association of University Women*, January, 1928. F. GARCÍA CALDERÓN'S article "Latin America, Europe, and the United States," in *Foreign Affairs* for January, 1929, is a good brief discussion of Latin-American international relationships. See also HERBERT HOOVER'S *Addresses delivered during the Visit to Central and South America* (Washington, 1929).

INDEX

Abbassids, 72
Abd-ar-Rahman I, 72
Abd-ar-Rahman III, 74
Abolition. *See* Slavery
Aborigines, mixture of blood with, in Latin America, 229, 251, 729
Abreu, Casimiro de, 766
Accessory Transit Company, 428, 429
Acevedo Díaz, Eduardo, 759
Acolhuas, 38
Aconcagua, Mount, 4
Acordada, 233
Acto Addicional, 696, 704
Acuerdo, 675
Adams, John Quincy, 340, 341, 343
Adelantado, 80, 156 n.
Affonso III, King of Portugal, 93
Affonso V, King of Portugal, 103 and n.
Affranchis, 278
Agriculture, among the backward aborigines, 21; among the Mayas, 26; among the Aztecs, 42; among the pre-Incan peoples, 49; among the Incas, 56, 57; in Moorish Spain, 73; under Ferdinand and Isabella, 90; in the Spanish Indies, 198–200; in colonial Brazil, 258–260; in Saint-Domingue, 277–278; in Haiti, 359–360, 364, 372; in the Dominican Republic, 387–388; in Cuba, 327, 409; in Central America, 439–440; in Mexico, 466; in Colombia, 515; in Panama, 521–522; in Venezuela, 534–535; in Ecuador, 548; in Bolivia, 561; in Peru, 580–581; in Chile, 593, 595; in Paraguay, 618, 631; in Uruguay, 645–646; in Argentina, 650, 680–682; in Brazil, 700, 723–725
Aguirre, Atanasio, 638–639
Agustín I. *See* Iturbide, Agustín de
Ahuehuete, 10
Alamedas, 243
Alans, 68
Alarcón, Hernando de, 121
Alarcón y Mendoza, Juan Ruiz, 218
Alberdi, Juan Bautista, 661, 762
Albuquerque, Georgina de, 777
Alcabala, 82, 90, 172, 472
Alcalde, 82
Alcaldes mayores, 157
Alcaldía, 157
Alencar, José de, 766–767
Alessandri, Arturo, 612, 613, 614, 615
Alexander VI, Pope, 87, 179
Alfaro Eloy, 545, 546
Alfonso VI, King of Castile and León, 93
Alfonso XIII, King of Spain, 750
Algarve, 93, 96, 100
Alhambra, 75
Almagro, Diego de, 131, 135, 137
Alpacas, 12, 49, 50, 56–57, 561, 562, 580
Alsina, Adolfo, 665, 666
Alvarado, Pedro de, 117, 119, 235
Álvarez, Agustín, 351
Álvarez, Juan, 458, 459
Alvear, Marcelo T. de, 679
Alves, Castro, 766
Alves, Rodrigues, 715–716, 719
Alzate, José Antonio, 216, 219
Amautas, 60
Amazon River, 9, 124, 138
Americanos, adoption of name in Spanish America, 288
Américo, Pedro, 777
Amis des Noirs, 281
Amunátegui, Miguel Luis, 764
Amusements and recreations, in Spanish Indies, 240–241; in colonial Brazil, 274; in modern Hispanic America, 737–738

Anchieta, José de, 249, 250, 267
Andagoya, Pascual de, 131
Andalusians, influence on Peru, 756
Andenes, 56
Andrada e Silva, Carlos Antonio, 686, 687, 694, 697
Andrada e Silva, José Bonifacio de, 268, 322, 686, 687, 688, 694
Andrada e Silva, Martím Francisco de, 687–688, 694
Andrade, Olegario Víctor, 761
"Antarctic France," 146
"Apostle of the Indies." *See* Las Casas, Bartolomé de
Arabesques, 75
Arabian blood, in Spain, 92; in Portugal, 100
Arabs in Spain, 71–75, *passim*
Aragon, 77 ff.
Aranda, Count of, 289
Aranha, Graça, 768
Araucanians, and primitive agriculture, 21; conflicts of, with the Spaniards, 139–140; with the Chileans, 584, 588, 599, 602–603; progress of, 734; women of, 739–740
Araujo Lima, Pedro de, 696–697
Arboleda Julio, 754–755
Arburu y Morell, José, 770
Arce, Manuel José, 413
Architecture, of Mayas, 28–30; of Toltecs, 36–37; of Zapotecs, 37; of Aztecs, 41–42; of Chibchas, 49; of pre-Incan peoples, 50–51; of Incas, 58–59; in Moorish Spain, 74–75; in Spanish Indies, 221–225; in colonial Brazil, 268–269; in present-day Latin America, 736
Argentina, most serious political problem of, 648; early period of turbulence, 649–654; and Pueyrredón, 649; and Rivadavia, 650–653; and war with Brazil, 653–654; in the "Age of Rosas," 654–660; under Urquiza, 660–663; constitution of 1853; 660–662; and war with Buenos Aires, 663–664; under Mitre, 664–665; under Sarmiento, 665–669; revolt in, 671–672; during Roca's first term, 672–673; political demoralization under Juárez Celman, 673–675; history from 1895 to 1916, 676–678; under Radical control, 678–680; recent economic progress of, 680–684; educational development in, 684–685. *See also* La Plata, viceroyalty of
"Argentine Nation," 661
Arias, Virginio, 776
Armada, Spanish, 175
Armada of the South Sea, 170
Arona, Juan de. *See* Paz Soldán y Unanue, Pedro
Art, among Mayas, 27–31; among Toltecs, 37; among Zapotecs, 37; among Aztecs, 42; among the pre-Incan peoples, 50–52; among the Incas, 59–60; in Moorish Spain, 74–75; in the Spanish Indies, 225–227; in colonial Brazil, 269; early characteristics of independent Hispanic America, 769–770; Cuban, 770–771; Mexican, 771–773; Venezuelan, 773; Ecuadorean, 773–774; Uruguayan, 774; Argentine, 773–774; Chilean, 775–777; Brazilian, 777
Arteaga, Sebastián de, 227
Arthur, Chester A., 779
Artigas, José, 303, 304
Asiento, 177
Asturias, 76, 78
Asunción founded, 141
Atahualpa, 133, 134, 135, 136
Audiencia, 81–82, 154–155
Austin, Moses, 449 n.
Austin, Stephen, 449, 450
Avellaneda, Nicolás, 669–670, 671
Ayala, Elegio, 628, 630
Ayllón, Lucas Vásquez de, 120
Aymarás, 52, 562
Aymerich, Melchor de, 302
Ayolas, Juan de, 141
Ayuntamiento, 80
Ayutla, Plan of, 458
Aztecs, general characteristics of, 38–47; confederation of, 38–39; government of, 39–40; social classes of, 41; dress, food, and homes of, 41; art and architecture of, 41–42; economic

activities of, 42; warfare of, 43; religion of, 43–45; education and learning among, 45–46; æsthetic qualities of, 46

Babello de Carbonero, Mercedes, 758
Báez, Buenaventura, 376–380, *passim*
Bahía founded, 146
Balboa, Vasco Núñez de, 112–113
Ballivian, José, 553
Balmaceda, José Manuel, 604–608
Balta, José, 568–569
"*Baltimore* affair," 609, 784
Banda Oriental, movement in, for independence from Spain, 303; invaded by Portuguese forces, 304; turns against the congress in Buenos Aires, 304; annexation to Brazil, 304. *See also* Uruguay
Bandeirantes, 245 n., 252–253. *See also* Paulistas
Barbosa, Ruy, 710, 712
Barbosa, Vidal, 319
Barcelona, 77
Barrios, Justo Rufino, 423–424
Barros, João de, 145
Barros Arana, Diego, 764
Barros Grez, Daniel, 764
Basques, 76–77, 91–92
Bastidas, Rodrigo, 129
Batres y Montúfar, José de, 746
Battles: of Poitiers, 71; of Aljubarrota, 94–95; of Carabobo, 301; of Boyacá, 301; of Pichincha, 302; of Chacabuco, 307; of Maipú, 308; of Ayacucho, 311; of San Jacinto, 453; of Lircay, 589; of Monte Caseros, 659; of Pavón, 664
Bay Islands, 418, 420
Bayard, Thomas Francis, 779
Bekman, Manoel, 256
Belalcázar, Sebastián de, 129–130
Belgrano Manuel, 303, 304, 349
Belize, 417, 418, 420
Bello, Andrés, 593, 595, 751 n., 762–763
Benavente Marcolino, Bishop, 610
Benton, Thomas, 455
Berbers, 71, 72
Bering, Vitus, 120
Bermúdez, Jorge, 775
Bernardelli, Rodolfo, 777
Bernardes, Arturo, 719–721
Best Maugard, Adolfo, 772
Bilboa, Francisco, 596
Bimini. *See* Florida
Blaine, James G., 609, 778, 779
Blanco Fombona, Rufino, 753–754, 784
Blanes, Juan, 774
Blanes, Nicanor, 774
Blest Gana, Alberto, 763–764
Bobadilla, Francisco, 109
Bogotá, Santa Fé de, founded, 130
Bolas, 21
Bolívar, Simón, early years of, 297; work for Spanish-American independence, 297–302, *passim*; confers with San Martín in Guayaquil, 309–311; completes emancipation of Peru, 311; early plans of, for international congress, 346; political plans for Spanish America, 350; suspicion against, 498; attempt against life of, 498; resigns authority, 498; dies, 499; remains of, buried in Caracas, 525; opposition of, to slavery, 526; constitution prepared for Bolivia by, 550
Bolivia, named, 311; causes for troubled political career of, 550–552; under Sucre, 551–552; united with Peru, 552–553; under Ballivian, 553; under Melgarejo, 553–554; relations of, with Chile over boundary and nitrates questions, 553–555; and War of the Pacific, 555–558; seeks to regain outlet to Pacific, 555–557; boundary settlements of, 558; later political career of, 558–559; economic development of, 559–562; education in, 563
Bonaparte, Joseph, 291
Bonaparte, Napoleon, and Saint-Domingue, 285–286; in Spain, 290–291, 292–293; and Spanish America, 291–292, 294, 298
Borgoño, Luis Barros, 613
Borno, Louis, 368, 373
Bourne, Edward Gaylord, 128, 153 n.
Boy Scouts, 742
Boyer, Jean Pierre, 319, 360–362

Braganza, Prince of, 719 n.
Braganza family flees to Brazil, 303–304, 320
Braz, Wenceslau, 718, 791
Brazil, discovered, 124; renamed, 143; first Portuguese settlers of, 144; establishment and settlement of captaincies in, 144–146; control of, centralized, 146; French in, 146–147; Dutch in, 147–148; colonial administration of, 245–247; the Church in, 248–250; immigration and expansion in, 250–254; Paulistas of, 251–253; government of, after freedom from Spain, 253–254; Portuguese commercial policy in, 254–257; Bekman's rebellion in, 256; early forest industries of, 257; stock-raising in, 258–259; agriculture in, 259; gold-mining in, 260–261; diamond-mining in, 262– labor in, 264–265; intellectual and artistic culture in, 265–269; classes of society in, 269–271; living conditions in, 271–274; transportation in, 274; colonial cities of, 275; flight of Portuguese royal family to, 303–304, 320; development of national spirit in, 319–320; declared a kingdom, 320–321; revolutionary disturbances in, 321–322; becomes an independent empire, 323; and Uruguay, 634–635, 638, 639; under Pedro I, 686–695; imperial constitution of, 688–689; revolt in Pernambuco, 690; loss to, of Cisplatine Province, 690–691; regency in, 695–697; under Pedro II, 697–710; and Paraguayan War, 699; material progress in, 700–702; education in, 704; abolition movement in, 702–703, 707–709; the Church in, 705–706; republican movement in, 706–707; overthrow of empire of, 709–710; the republic of, 710–730; the constitution of the United States of, 710–712; under Deodoro da Fonseca and Peixoto, 712–713; under Moraes Barros, 713; under Campos Salles, 713–715; settlement of boundary disputes of, 714–715; under Alves, 715–716; under Penna, 716–717; under Peçanha, 717; under Braz, 718–719; under Silva Pessôa, 719; economic development in, under republican rule, 721–729; education in, under republican rule, 729–730
Bryce, James, 351
Buchanan, William, 610
Bueno, Amador, 253
Buenos Aires, founded, 141–142, 143; captured by the British, 302; attempts of, to dominate provinces of Plata, 303, 648, 649
Bulnes, Manuel, 592, 593–596
Bunau-Varilla, Felipe, 510
Bunge, C. O., 743

Caballería, 193–194
Caballero de Góndora, Antonio, 215
Cabeza de Vaca, Alvar Núñez, 121, 141–142
Cabildo, 153, 292. *See also Ayuntamiento*
Cabildos abiertos, 153–154
Cabot, Sebastian, 140, 141
Cabral, José María, 378–379
Cabral, Pedro Alvares, 124
Cabrera, Miguel, 227
Cabrillo, Juan Rodríguez, 120
Cáceres, Andrés, 576
Cáceres, José Núñez de, 318–319
Cáceres, Ramón, 383
Cádiz, 66, 165, 167
Cádiz, Cortes of, 292, 299
Caetano, José, 686, 689 n.
Caixa de Conversão, 716–717 and n.
Caldas, Francisco José, 215
Calderón de la Barca, Ángel, 339
California, gold rush to, and Chile, 595
Calixto, B., 777
Callahan, J. M., cited, 326
Calles, Plutarco Elias, secretary of war under Obregón, 488; elected president of Mexico, 488; and labor, 488–489; and distribution of land, 489; and education, 489; and public health, 489–490; relations of, with the United States, 490–492; and the Church, 492–493; puts down revolt, 494

Index

Calvo, Carlos, 786 n.
Cámara de Castilla, 180
Cámara de Indias, 180
Campero, Narciso, 555–556
Campos Salles, Manoel Ferrez de, 713–715
Canning, George, 342
Caperton, W. B., 367
"Capital Question," in Argentina, 662, 666, 671–672
Captaincies in Brazil, 144–147
Captaincies-general, 146, 156
Capuchins, 277
Caracas founded, 131
Caracas Company. *See* Guipúzcoa Company
Carcova, Ernesto de, 774–775
Carlota, Empress of Mexico, 463, 464 and n.
Carlota Joaquima, Queen of Portugal and Brazil, 304, 312 n.
Carnegie, Andrew, 430, 781 n.
Caro, José Eusebio, 754
"Caroline Academies," 214
"Carpetbaggers" in Argentina, 674
Carranza, Emilio, 492
Carranza, Venustiano, resists Huerta, 480; and Niagara conference, 482; occupies Mexico City, 482; and the United States, 482; policy of, 483–484; revolt against, 484; flight of, from Mexico City, 485; murdered, 485
Carrera, Rafael, 415–416, 422–423
Carroll, James, 392 n.
Cartagena, in Colombia, founded, 129
Cartagena, in Spain, 67
Carthaginian conquest of Spain, 67
Carthago Nova. *See* Cartagena, in Spain
Carvalho, Manoel de, 690
Casa de Contratación, 152, 165–167, 181, 199
Casaus, Archbishop, 412, 413
Caspicara. *See* Chili, Manuel
Castile, 76–92, *passim*, 149
Castilla, Ramón, 566, 567
Castilla de Oro, 113
Castro, Cipriano, 531, 532
Catalonia, 77, 78
"Catholic Kings," 87
Caudillos, 352
Cavendish, Thomas, 174
Ceiba, 10
Cenote, 35
Central America, early political factions in, 411; constitution of, 411–412; progressive legislation in, 412; early zeal for education in, 412; civil war in, 412–413; under Morazán, 413–416; struggles between Morazán and Carrera in, 415–416; dissolution of confederation of, 416; attempts at political reunion in, 416–417, 423, 435–436; foreign meddling in, 416–418; and the Clayton-Bulwer treaty, 418–420; states of, hold conference in Washington, 437; economic and educational development in, 438–442. *See also* Guatemala, captaincy-general of, and names of individual states
Centurión, Emilio, 775
Centurión, Manuel, 773
Cerro do Mar, 2
Ceuta, captured from the Moors, 95
Chamorro, Emiliano, 434
Chanchán, 50
Chancillería, 82
Chapman, Charles E., 399, 407
Charlemagne, Haitian caco chieftain, 369
Charles X of France, 361
Charles the Great, 77
Charles Martel, 71
Charles I of Spain. *See* Charles V, Emperor
Charles III of Spain, 178, 187, 289
Charles IV of Spain, 178, 291
Charles V, Emperor, 85, 90, 114, 125, 140, 154
Charqui, 198
Charrúas, 642, 759
Chasquis, 55
Chavín de Huantar, 50
Checks and balances, system of, in Spanish Indies, 161
Chibchas, 47–49
Chicha, 49
Chichen Itza, 21, 23, 29

Chichimecas, 38
Chile, colonized by Spaniards, 139–140; early movements for independence in, 305; freed from Spain by San Martín, 307–308; factors hastening political stability in, 584; progress of, under O'Higgins, 585–586; federal theories and political chaos in, 587–589; constitution of (1833), 589–591; progress of, under dominating Conservative executives, 592–600; and war with Spain, 600; under dominating Liberal executives, 601–606; civil war in, 606–608; era of cabinet government in, 608–614; and boundary disputes with Argentina, 609–610; constitution of (1925), 614–615; recent progress under strong executives, 614–616
Chilean Nitrate Company, 555
Chili, Manuel, 226
Chiloé Archipelago, 587
Chimborazo, Mount, 4
Chimu, 50, 51
Chincha Islands, 566
Chinchón, Countess of, 197 n.
Chocano, José Santos, 758
"Christ of the Andes," 610 n.
Christian I, King of Denmark, 103
Christophe, Henri, 359–360
Chunca, 53
Chunca camaya, 53
Church, Roman, in Spain, 69–92, *passim*; in Portugal, 99; in the Spanish Indies, 179–192, 209; in colonial Brazil, 248–250, 264; in Cuba, 336; in Haiti, 362–363; in Central America, 412, 413–414; in Mexico: under plan of Iguala, 444–445; under constitution of 1824, 446; and constitution of 1857, 460–461; War of the Reform against, 461–462; changes in, before 1877, 467–468; and Díaz, 476; and constitution of 1917, 483; and Calles, 492–493; and Portes Gil, 494–495; in Colombia: under Santander, 497, 500; under Herrán, 501; under López, 503; and Liberals, 505, 513; and Conservatives, 506–507, 518; in Venezuela, 523–524, 529–530; in Ecuador, 537, 540, 541, 544–546; in Bolivia, 559; in Peru, 577; in Chile: under O'Higgins, 586; under Freire, 587; movement to restrict, 597–598, 601, 602, 603; disestablished in, 615; in Paraguay, 619, 620; in Uruguay, 642; in Argentina, 650, 661, 679; in Brazil, 689, 705–706, 711; present status of, in Latin America, 733
Cíbola, 121
Ciccarelli, Alejandro, 776
Cisplatine Province. *See* Banda Oriental and Uruguay
Cities, in Spanish Indies, 242–244; in colonial Brazil, 275
Cittadini, Tito, 775
Clay, Henry, 340
Clayton, John M., 419
Clayton-Bulwer Treaty, 418–419, 431 n., 508, 785
Clement IX, Pope, 184
Clement XIV, Pope, 187 n.
Clerico-military orders, 84–85, 97
Cleveland, Grover, 531, 673, 677
Climate, of Latin America, 5–7; influence of, 14–15; of the Iberian peninsula, 65
Cobá, 21
Cobó, Bernabe, 217
Cochrane, Thomas, Lord, 308, 323, 690
Code noir, 279
Coimbra, Cortes of, 94
Colegios, 210
Colombia, settled, 129; republic of, proclaimed, 301; troubles of, 496–498; disruption of, 498–499; reorganization of government of, as New Granada, 499; under Santander, 500; during Mosquera's first term, 501–502; influence of European revolutions in, 502–503; reorganization of, as "Granadine Confederation," 503; constitution for the United States of, 504; under the Liberals, 504–505; under Núñez, 506–507; rejects Hay-Herrán Treaty, 508; and the loss of Panama, 509–511; boundary settlements of, 512; under later Conserva-

tive rule, 512–513; and Liberal victory of 1930, 513; economic development of, 513–517; types of population in, 517–518; educational conditions in, 518–519. *See also* New Granada, Great Colombia, and Panama
Colonia del Sacramento, 176, 187 n.
"Colossus of the North," 785, 786
Columbus, Bartholomew, 108
Columbus, Christopher, influences upon, encouraging voyage to west, 104; capitulations of, with Ferdinand and Isabella, 104–105; first voyage of, 105–106; second voyage of, 107–108; third voyage of, 108–109; sent home in chains, 109; fourth voyage of, 109; death of, 109
Columbus, Diego, 111
Comonfort, Ignacio, 459, 460–461
Companhia do Commercio do Maranhão, 255
Comte d'Eu. *See* Orleans, Gaston d'
Confederación Regional Obrera Mexicana, 486–487, 488–489
"Confederation of the Equator," 690
Congo River discovered, 97
Congresses: of Angostura, 300; of Tucumán, 306–307; of Troppau, 341; of Cúcuta, 496–497
Conquistadores, 114
Conquistas de almas, 184
Consejo real, 85–86
Constant, Benjamin, 706, 709, 712
Consulado, 166
Contador, 165
Coolidge, Calvin, 491, 794, 795
Copán, 21, 22
Córdova, in Spain, 72, 73, 74
Córdova, Francisco Hernández de, 114
Córdova League, 673
Coronado, Francisco, 121–123
Corral, Ramón, 477, 478
Corregidor, in Spain, 80; in the Spanish Indies, 156–157, 160
Corregimiento, 156
Correo mayor, 166
Corruption, in the Spanish Indies, 162–163; in Brazil, 247; in Cuba, 327; in independent Latin America, 351–352, 356
Corte-Real, Gaspar, 103 n. 2
Corte-Real, João Vaz, 103
Cortes, in Spain, 80–81, 85; in Portugal, 98, 99; absence of, in Spanish Indies, 154
Cortés, Hernando, conquers Tabasco, 114–115; founds Vera Cruz, 115; and Moctezuma, 115–117; and Narváez, 117–118; driven out of Tenochtitlán, 118; conquers and rebuilds Tenochtitlán, 118; secures approval of Charles V, 118; extends territorial control, 119; residencia of, 161 n.; and missionary work in Mexico, 183; encourages agriculture in Mexico, 199
Corvée, 368–369
Costa, Ángela de Oliveira de, 610 n.
Costa Rica, political career of, 420–421; opposes Barrios of Guatemala, 423; protests against the Bryan-Chamorro Treaty, 432–433
Council of the Indies, 150–152, 156, 165
Court of Justice, Central American, 430, 433
Coutinho, Vasco Fernandes, 145
Creelman, James, 477
Crespo, Joaquín, 530
C. R. O. M. *See Confederación Regional Obrera Mexicana*
Crowder, Enoch, 404, 405, 406
Cruz, Oswaldo, 716
Cuauhtemoc, 118, 771–772
Cuba, discovered, 105; circumnavigated, 111; settled, 111; fails to become free from Spain during the general movement for independence, 324–325; Spanish administration of, after 1825, 326–327; economic pursuits in, 327–328; filibustering activities in, 328–329; attempts of the United States to acquire, 329–330; junta of information and, 330; Ten Years' War in, 330–331; restrictions on trade of, 331–332; war for independence of, 332–335; Spain relinquishes control of, 335; occupied by the United States, 335–337; constitu-

tion of, 336; granted independence, 337; condition of, at time of independence from Spain, 391; progress made in, under Leonard Wood, 391–394; under Estrada Palma, 394–398; United States intervention in, 398; second United States military occupation, 398–399; under Gómez, 399–400; under Menocal, 400–404; under Zayas, 404–407; under Machado, 407–410
Cuba libre, 332, 337
Cumaná founded, 130
Cunha, Euclydes da, 768
Curia, 81
Curtis, William E., 780
Cuzco, 53, 578, 582

"Dance of the millions," 401
Darién founded, 112
Darío, Rubén, 745, 746–747, 785
Dartiguenave, Philip, 367
Darwin, Charles, 659
Dávila, Isabel, 235
Dawson, Thomas C., 431
Daza, Hilarión, 554, 555
Declaration of independence, of Venezuela, 295–296; of La Plata, 307; of Mexico, 314; of Central America, 316, 317; of Paraguay, 621
Declaration of the Rights of Man, and Saint-Domingue, 281; and Antonio Nariño, 289–290; and the Venezuelan constitution, 296
De la Cosa, Juan, 123
De la Cruz, José Maria, 596
De la Cruz, Juana Ines, 218, 234–235
De la Cueva, Beatrize, 235
De la Huerta, Adolfo, 485, 486, 488
De León, Ponce, 111, 119
Delgado, Matías, 412, 413
Delgado, Rafael, 751
Deodoro da Fonseca, Manoel, 707, 709, 712
Derqui, Santiago, 663, 664
Designados, 513
De Soto, Hernando, 121, 122–123, 133
Dessalines, Jean Jacques, 286, 358–359
Diamonds, 5, 262
Dias, Gonçalves, 765–766
Díaz, Adolfo, 435
Diaz, Bartholomeu, 97
Díaz, Eugenio, 755
Díaz, Porfirio, helps restore order in Central America, 430; revolt of, against Juárez, 465; revolt of, against Lerdo de Tejada, 466; proclaimed president of Mexico, 466; early career of, 470–471; political methods of, 471; and economic development of Mexico, 472–473; and division of Mexican lands, 474–475; weaknesses of régime of, 475–477; development of opposition to, 477–478; resignation and death of, 478
Díaz del Castillo, Bernal, 217
Díaz Rodríguez, Manuel, 753
Diomede Islands, 17
Disease in Latin America, 15, 243 n. *See also* Sanitation and health
Doctrineros, 182
Domínguez, Josefa María de, 313 n.
Domínguez, Miguel, 313 n.
Dominican friars, 182, 277
Dominican Republic, fears Haitian reconquest, 375–376; attempts of Soulouque against, 376–377; reunion with Spain, 377–378; restoration of independence of, 378; financial difficulties of, 378–379; negotiations for annexation of, to the United States, 379–380; under Heureux, 380–381; new financial difficulties of, 381–382; control of customs of, by the United States, 382–383; continued political disorders in, 383–384; occupation of, by the United States, 384–385; withdrawal of United States forces from, 385–386; population of, 387; economic development of, 387–389; education in, 389–390. *See also* Santo Domingo
Dorrego, Manuel, 654
Drago, Luis M., 786
Drago Doctrine, 786
Drake, Francis, 173–174
Drama, the, in the Spanish Indies, 221

Index

Dreyfus and Company, 569
Duarte, Juan Pablo, 375, 376
Durand, Oswald, 364 n.
Durão, Santa Rita, 267
Dutch in Brazil, 147, 148

Eannes, Gil, 96
Echave, Baltázar de, *el Viejo*, 227
Echenique, José Rufino, 566–567
Echeverría, Esteban, 760
Ecuador, secession of, from Great Colombia, 499; period of Flores and Rocafuerte in, 537–540; era of García Moreno in, 541–545; under Liberal control, 545–546; boundary disputes of, 547–548; recent economic development of, 548; social conditions in, 549; education in, 549. *See also* Quito, presidency of
Eden, Richard, 112–113
Education, among the Aztecs, 45; among the Incas, 60; in Moorish Spain, 73–74; under Isabella and Ferdinand, 90–91; of mission Indians, 189; in Spanish Indies, 209–214; in colonial Brazil, 265–266; in Haiti, 363–364, 372; in the Dominican Republic, 389–390; in Cuba, 392, 393, 396, 399; in Central America, 412, 414, 442; in Mexico, 468, 476, 484, 487–488, 489; in Colombia, 500, 505, 518–519; in Panama, 522; in Venezuela, 524, 529, 535–536; in Ecuador, 543, 544, 549; in Bolivia, 563; in Peru, 567, 570, 582–583; in Chile, 585, 593, 597, 600, 605, 611–612, 616; in Paraguay, 620, 633; in Uruguay, 647; in Argentina, 650, 657, 662–663, 668–669, 684–685; in Brazil, 695, 704–705, 729–730
Edward VII, King of England, 610
Egaña, Juan, 346
Egaña, Mariano, 589
Ejidos, 475
Elcano, Juan Sebastián, 128
El Dorado, 48, 129, 130
Elhuyar, José Fausto, 214
Elio, Viceroy of La Plata, 303, 304
Eliot, Charles W., 394
"El Supremo." *See* Francia, José Gaspar Rodríguez
Emboabas, 260
Emparán, captain-general of Caracas, 294
Encomienda, 82, 205, 206–207
England, and Spanish-American independence, 290, 300; aids Braganza family to escape to Brazil, 320; and Cuban independence, 325, 326; and the designs of the Holy Alliance, 341–343; and the Dominican Republic, 376; and Central America, 417–420; and Mexico, 462; and Venezuela, 530–531, 531–532; and Paraguay, 622; and Uruguay, 635, 637; and Argentina, 658; and Brazil, 715
Entradas, in the Spanish Indies, 184; in colonial Brazil, 252 n.
Ercilla, Alonzo de, 139
Errázuriz, Federico, 601
Española. *See* Hispaniola
Estrada Cabrera, Manuel, 424–425
Estrada Palma, Tomás, 332, 337, 394–398, *passim*

Falkland Islands dispute, 658, 673
Fauna of Latin America, 11–13
Faustin I. *See* Soulouque, Faustin
Fazendas, 271
"Feathered Serpent." *See* Quetzalcoatl
Federalist, The, 661, 669
Feijó, Diogo Antonio, 696
Ferdinand II, King of Aragon, 84–92, *passim*
Ferdinand VII, abdication of, 291; the Spanish Indies and, 292; restoration of, 299; despotism of, 299
Fernández, Juan, 204
Fernão, King of Portugal, 93–94
Ferrelo, Bartolomé, 120
Figueira, Andrade, 708
Figueroa, Emiliano, 615
Filísola, Vicente, 317
Finances, in Haiti, 361, 362, 365–366, 369–370; in the Dominican Republic, 379, 381, 382–383; in Cuba, 405–410, *passim*; in Central America, 438;

in Mexico, 458, 462, 472, 473, 485–486; in Colombia, 513–514; in Ecuador, 548; in Peru, 566, 568–570, 576; in Chile, 604–605, 612, 616; in Paraguay, 630–631; in Uruguay, 646–647; in Argentina, 673–674, 676; in Brazil, 713–714, 716–717, 725
Finlay, Charles John, 392
Fisher, Lillian Estelle, 161
Fleet system, in Spanish Indies, 168–170; in colonial Brazil, 255
Flora of Latin America, 9–11
Flores, Juan José, leads Ecuador in secession from Great Colombia, 499; as president of Ecuador, 537–538, 539–540; aids García Moreno to get control of Ecuador, 540–541
Flores, Venancio, 624, 638, 639
Florida, discovered, 119; purchased by the United States, 340
Flota, 168
Fonseca, Juan Rodríguez de, 150
Ford, Henry, 723 n.
Foundation Company, 582, 616
"Four United Provinces, the," 53
France, recognizes independence of Haiti, 361; financial claims of, against Haiti, 366; claims of, against Mexico, 451; and Paraguay, 622; and Rosas of Buenos Aires, 637
Francia, José Gaspar Rodríguez, leads movement for Paraguayan independence, 303; early career of, 617; assumes control of Paraguayan government, 617–618; rule of, 618–619; dies, 620
Franciscans in Spanish Indies, 184–185, 187, 188–189, 210
Franco, Guillermo, 540
François, Auguste, 776
Freire, Ramón, 586, 587, 589, 591
French Canal Company, 508
French West India Company, 276
Fuero Juzgo. *See Lex Visigothorum*

Gadir. *See* Cádiz
Gadsden Purchase, 458
Gage, Thomas, 239, 241
Gaiseric, 68
Galapagos Islands annexed by Ecuador, 538
Galeones, 168–169
Galicia, 76, 78
Gallatin, Albert, 341
Gama, Basilia da, 267
Gama, Vasco da, 97
Gamboa, Federico, 751
Gandarillas, Manuel José, 589
Gante, Pedro de, 210
Garay, Juan de, 142–143
García, Manuel Romero, 753
García Mérou, Martín, 767
García Moreno, Gabriel, gains control of Ecuador, 541; training and early political career of, 541; as dictator of Ecuador, 542–545; assassinated, 545
García Munge, J., 442
García-Calderón, Francisco, 505; writings of, 758
Garcilasso de la Vega, Inca, 54, 57, 59, 62, 138; as a writer, 217
Garibaldi, Giuseppe, 637
Gaúcho, 735
Gauchos pobres, 232, 235
Gay, Claudio, 593
Gebel-al-Tarik. *See* Gibraltar
Geffrard, Nicolas, 362, 363, 378
Gens de couleur. *See Affranchis*
Geography, influence of, on Latin American history, 13–16; on Spanish history, 64–66
Germany, financial claims of, on Haiti, 366; on Venezuela, 531
Gibraltar, 71
Gil Fortoul, José, 752–753
Girl Guides in Latin America, 742
Godoy, Manuel de, 289
Goldberg, Isaac, 750, 765
Gómes, Carlos, 767
Gómez, Arnulfo, 493
Gómez, Esteban, 120, 126
Gómez, José Miguel, 399–400, 403
Gómez, Juan Carlos, 759
Gómez, Juan Vicente, 532–536
Gómez de Avellaneda, Gertrudis, 748–749
Gómez Farías, Valentín, 448

Index

Gonzaga, Thomé Antonio, 267–268
González, Ignacio María, 380
González Dávila, Gil, 113–114
González Martínez, Enrique, 750
Good Hope, Cape of, doubled, 97
Government, characteristics of, in Latin America, 352–356
Granada, Nicaragua, founded, 114
Granada, Spain, 78, 88–89
"Granadine Confederation." *See* Colombia
Grandees. *See Ricos hombres*
Grant, Ulysses S., and the Dominican Republic, 379–380
Great Colombia (union of Venezuela, New Granada, and Quito), formation of, 301–302; disruption of, 496–499
Great Khan of Cathay, 105–106
Greeks in the Iberian Peninsula, 67
Grijalva, Juan de, 114
Grito de Dolores, 313
Grito do Ypiranga, 323
Grubb, W. Barbrooke, 632
Guanaco, 12
Guardía, Tomás, 420–421
Guardías rurales, 471
Guatabita, Lake, 48
Guatemala, under Carrera, 421–423; under Liberal control, 423–424; under Estrada Cabrera, 424–425; recent changes in, 425. *See also* Central America, and Guatemala, captaincy-general of
Guatemala, captaincy-general of, declaration of independence in, 316; movement of Mexico to annex, 316–317; establishes independence, 317
Guatemala City, elevation of, 6; founded, 119
Guayaquil, sanitation of, 548
Guayrá Falls, 9
Guerra, Gabriel, 772
Guerrero, Gustavo, 796
Guerrero, Vicente, 314–315, 446–447
Guiana, highlands of, 3
Guido y Spano, Carlos, 761
Guipúzcoa Company, 173, 176, 287 n.
Gutiérrez González, Gregório, 755
Gutiérrez Nájera, Manuel, 749–750
Guzmán, Antonio Leocadio, 525, 526
Guzmán Blanco, Antonio, 528–530

Hacienda, 164
Hague Conference and Latin America, 780–781
Hague Court, 781
Haiti, discovered, 106; name assumed by Saint-Domingue, 286; bad start of, as a nation, 357–358; fear of France in, 358; under Dessalines, 358–359; under Pétion and Christophe, 359–360; under Boyer, 360–362; under Soulouque, 362; social, religious, educational, and economic conditions in, before 1915, 362–365; financial conditions of, and the United States, 365–366; political demoralization in, 366–367; United States occupation of, 367; treaty of, with the United States, 367; constitution of 1918, 367–368; revolt of *cacos* in, 368–369; progress of, under United States intervention, 369–372; complaints of, against the intervention, 372–373; adjustment of grievances in, by United States commission, 373. *See also* Saint-Domingue and Hispaniola
Hanson, Henry, 582
Harding, Warren Gamaliel, 511
Haring, Clarence H., 169, 175
Hartmont and Company, 379
Havana Company, 173
Havana founded, 111
Hawkins, John, 175
Hayes, Rutherford B., 626
Hay-Pauncefote Treaty, 508, 785
Henri I. *See* Christophe, Henri
Henríquez, Camilo, 293–294
Henríquez y Carvajal, Francisco, 384, 745
Henríquez y Ureña, Max, 746
Henríquez y Ureña, Pedro, 746
Henry, Count of Burgundy and Portugal, 93
Henry, King of Portugal, 99, 100
Henry, Prince, the Navigator, 95–97

Heredia, José María, 747
Heredia, Pedro de, 129
Herencia real, 194
Hermandades, 80
Hermes da Fonseca, 717–718
Hernández, José, 760
Herrán, Pedro Alcántara, 501
Herrán, Saturnino, 772
Herrera, Carlos, 425
Herrera, José Joaquín, 454–455
Heureaux, Ulises, 380–381
Heyn, Piet, 174
Hidalgo y Costilla, Miguel, 313
Hidalgos, 82
Hispaniola, 106, 108–109, 196, 198, 210, 211
Holland, and Venezuela, 532; and Brazilian boundary dispute with Dutch Guiana, 715
"Holy Alliance," 341
Honduras, and the Mosquito protectorate, 418, 419–420; political career of, 426–427. *See also* Central America
Honduras Company, 173
Hoover, Herbert, 373, 796–797
Hopkins, Edward, 622
Hostos, Eugenio María, 389–390
House of Trade. *See Casa de Contratación*
Huacos, 51
Huascar, 132, 135
Huastecs, 39
Huayna Capac, 132
Huerta, Victoriano, revolts against Madero, 479; watchful-waiting policy of United States toward, 479–481; and A B C mediation of Tampico affair, 481–482; resigns, 482
Hughes, Charles Evans, 434, 795, 796
Hugo, Victor, influence of, on Latin-American literature, 744, 763
Huitzilopochtli, 43
Humboldt, Alexander von, 207–208
Humboldt Current, 6, 204
Huntington, Ellsworth, 14
Hunu, 53

Ibáñez, Carlos, 615–616
Ibarra, José María, 227
Iberian Peninsula, 64–68. *See also* Spain and Portugal
Iberians, 66, 76
Icazbalceta, Joaquín García, 184 n.
Iguassú Falls, 9, 142
Iguassú River, 677
Illimani, Mount, 4
Immigration, control of, to the Indies by the *Casa de Contratación*, 165, 181; to Cuba, 327; to Chile, 594; to Paraguay, 630–631; to Uruguay, 643–644; to Argentina, 658, 662, 670, 672–673, 683–684; to Brazil, 694–695, 701–702, 728–729
Inca, the, 53
Inca, Lake of the, 7
Incas, extent of empire of, 52; government of, 53–54; roads of, 54–55; labor system of, 55–56; paternalism of, 55–58; architecture of, 58–59; metallurgy of, 59; art of, 59–60; education and learning among, 60–61; religion of, 61–63
Industrial Workers of the World, 612
Inquisition, in Spain, 83–90; in Portugal, 99; in Spanish Indies, 181–182, 220, 314; in colonial Brazil, 248; abolished in Mexico, 446; abolished in Great Colombia, 496–497
Intendant in Spanish Indies, 160–161
Inter-American conference, first general, 779–780; second, 780; third, 780–781; fourth, 781; fifth, 781–782, 793–794; sixth, 795–796. *See also* Pan-American Arbitration Conference and Pan-American Union
International Bureau of American Republics. *See* Pan-American Union
International Commission of Jurists, 794
International Union of American Republics. *See* Pan-American Union
Irala, Domingo Martínez de, 142
Irigoyen, Bernardo, 675
Irigoyen, Hipólito, 678–679, 680
Irmandades, 250
Isaacs, Jorge, 755
Isabel, Princess of Brazil, 707, 708, 709 n.
Isabella, Queen of Castile, 84–92, *passim*, 104, 108

Index

Isabella II, Queen of Spain, 377, 378
Isabella, town, founded by Columbus and abandoned, 108
Islas, Juan, 771
Islas, Manuel, 771
Isle of Pines, 395
Italy, claims of, against Venezuela, 531–532
Iturbide, Agustín de, 314–317, 443–444
Iturrigaray, José de, 312

Jamaica, discovered, 108; settled, 111
Jangada, 203
Januaria, Princess of Brazil, 697
Jara, Ramón Angel, 610
"Jerky." *See Charqui*
Jesuits, in Spanish Indies, 185–189, 192, 200, 213, 214; in colonial Brazil, 249, 251, 266; in Colombia, 501, 503
Jews, in Spain, 68, 71, 83–84, 87; expulsion of, from Spain, 89; expulsion of, from Portugal, 98–99; in Brazil, 271; in Colombia, 518
Jiménes, Francisco, 87, 89
Jiménez, Juan Isidro, 384
João I, King of Portugal, 94–95
João II, King of Portugal, 98, 106, 107
João III, King of Portugal, 99, 144
João IV, King of Portugal, 148, 249, 253
João VI, King of Portugal, Algarve, and Brazil, as regent for mother, flees to Brazil, 303–304, 320; brings about changes in Brazil, 320–321; wars of, in Brazil, 321–322; returns to Portugal, 322; dies, 691
John of Gaunt, Prince of England, 94, 95
Jones, T. A. C., 452
Jordán, López, 667–668
José I, King of Portugal, 187 n., 256
Journalism in the Spanish Indies, 219
Juárez, Benito, early career of, 459; and legislation against the Church, 459; leader of the War of the Reform, 461–462; elected president of Mexico, 462; and European financial claims, 462; and war against Maximilian, 463–464; elected president of Mexico (1867), 465; revolts against, 465; reëlected, 465; dies, 466
Juárez Celman, Miguel, 673–675
Junta Protectora de la Raza Indígena, 549
Juntas, revolutionary, in Spain, 291; in Spanish Indies, 292

Karsten, Rafael, 62
Kellogg, Frank, and Mexico, 490, 491, 793, 794; and "Question of the Pacific," 573–574
Kemmerer, Edwin W., 514
Kino, Eusibio, 185
Knapp, H. S., 385
Knox, Philander, 789
Koster, Henry, 258 n., 270 n.
Kroeber, A. L., 17, 20 n.
Kukulcan. *See* Quetzalcoatl

"La Araucana," 140
Labna, 23
Labor, in Spain, 70, 90; in Portugal, 100; in the Spanish Indies, 204–207; in colonial Brazil, 264–265; in Saint-Domingue, 278; in colonial Cuba, 327–328; in Central America, 441–442; in Mexico, 469–470, 475–476, 483, 486–487, 488–489; in Colombia, 502; in Ecuador, 549; in Bolivia, 562; in Peru, 581–582; in Chile, 612; in Paraguay, 632–633; in Uruguay, 643–644; in Argentina, 683–684; in Brazil, 707–708, 721–722. *See also* Slavery
La Fetra, Adelaide Whitfield, 739 n.
La Navidad, founded, 106; destroyed, 108
Land, distribution of, in Spanish Indies, 193–195; in colonial Brazil, 251; system of, in Dominican Republic, 388; and Ley Lerdo in Mexico, 459–460, 469; and Díaz's policy in Mexico, 475; under Calles in Mexico, 489; monopoly of, in Ecuador, 549; monopoly of, in Bolivia, 562; monopoly of, in Chile, 584; policy regarding, in Uruguay, 643; monopoly of, in Argentina, 684

Landa, Diego de, 25, 31–32
La Plata, viceroyalty of, early movement for independence in, 302–303; declaration of independence of, 307. *See also* Argentina
La Plata River, 8, 637
Las Casas, Bartolomé de, 206–207
Lassiter, William, 572, 573
Lastarría, José Victorino, 596
La Trinitaria, 375
Lavalle, Juan, 654
Lavalleja, Juan Antonio, 634
"Laws of the Indies," 151
Lazear, Jesse W., 392 n.
League of Nations, and Panama, 521; and Bolivia, 557; and the Paraguayan-Bolivian boundary dispute, 629; and the Latin American countries, 791, 793
Leclerc, General, 285, 286
Leguía, Augusto B., 577, 579, 582, 583
Lemmi, Charles W., 102
León, 76, 78, 81
Leonora, Queen of Portugal, 94
Leopoldina, Empress of Brazil, 686, 691
Lerdo de Tejada, Miguel, 459
Lerdo de Tejada, Sebastián, 465, 466
Lesseps, Ferdinand de, 508
Lex Visigothorum, 70
Ley Juárez, 459
Ley Lerdo, 459–460
Libraries, in Moorish Spain, 74; in the Spanish Indies, 214; in Central America, 442; in Mexico, 468, 487; in Brazil, 730
Lillo, Eusebio, 596
Lima founded, 136
Limantour, José Ives, 472
Lindbergh, Charles A., 492, 795
Liniers, Santiago de, 302
Lira, Pedro, 776
Literature, of the Mayas, 31–32; of the Aztecs, 46–47; in the Spanish Indies, 214–218; in colonial Brazil, 266–268; in Haiti, 364 n.; causes for interest in, in Latin America, 743–744; in the Dominican Republic, 745–746; in Guatemala, 746; in Nicaragua, 746–747; in Cuba, 747–749; in Mexico, 749–751; in Venezuela, 751–754; in Colombia, 754–755; in Ecuador, 755–756; in Peru, 756–758; in Uruguay, 758–760; in Argentina, 760–762; in Chile, 762–764; in Brazil, 745, 765–769
Livingston Code, 414
Llamas, 12, 49, 50, 56–57, 561, 580
Llaneros, 230, 232
Llanos, 9
Llona, Numa Pompilio, 756
Lome, Dupuy de, 333
López, Carlos Antonio, 619–623
López, Francisco Solano, made commander of Paraguayan army, 622; succeeds father as ruler of Paraguay, 623; policy of, 623–624; relations of, with Brazil, 624; and war against the triple alliance, 624–625; killed, 625; outlawed by the provisional government of Paraguay, 627
López, José, 503
López, Narciso, 329
Losada, Diego de, 131
Louis XVIII, King of France, and Haiti, 361
Louis Philippe, King of France, and Haiti, 361; and the Dominican Republic, 376
L'Ouverture, Toussaint, 284–286
Lower California discovered, 120
Lugo, Luis Alonzo de, 130
Luisi, Paulina, 741
Luque, Hernando de, 131, 132
Lutz, Bertha, 741
Lynch, Elisa, 623, 628

McCoy, Frank R., 629
Machado, Gerardo, 407–410, 795
Machado de Assis, Joaquim María, 767
Maciel, Antonio, 768
McKinley, William, 332–333, 334–335
Madeiros, Burges de, 720 n.
Madero, Francisco, criticizes government of Díaz, 477–478; leads revolt against Díaz, 478; president of Mexico, 478–479; imprisonment and assassination of, 479

Index

Magalhães, Gonçalves de, 765
Magalhães Gandovo, Pedro de, 267
Magariños Cervantes, Alejandro, 759
Magdalena River, 8, 516
Magellan, Ferdinand, 125–128
Magellan, Strait of, discovered, 126; settled, 594
Magoon, Charles Edward, 398–399
Maine, battleship, 333–334
Maitín, José Antonio, 751–752
Manco, Inca, 136–137
Manoel I, King of Portugal, 97, 98, 99
Manufacturing, in Spain, 73, 90; in the Spanish Indies, 200–201; in colonial Brazil, 262–263; in the Dominican Republic, 389; in Cuba, 409–410; in Central America, 440; in Mexico, 466–467; in Colombia, 516; in Venezuela, 535; in Bolivia, 562; in Peru, 581; in Paraguay, 631–632; in Uruguay, 646; in Argentina, 682; in Brazil, 726
Maravedí, 203
Marblehead, U.S. cruiser, 425
María I, Queen of Portugal, 320, 321
María da Gloria, Princess of Brazil, 691, 692, 694
Mariana, Indian woman, interpreter for Cortés, 115
Marimba, in Spanish Indies, 221
Marmol, José, 761–762
Márquez, José Ignacio, 500–501
Marroquín, José Manuel, 507
Martí, José, 332, 748
Martin, Percy Alvin, 790
Martins Homen, Alvaro, 103
Masons, Free, in Mexico, 445, 446; in Colombia, 497, 502; in Ecuador, 541; in Brazil, 706
Masterman, George Frederick, 622
Matte de Iñiguez, Rebecca, 776–777
Matto de Turner, Clorinda, 757–758
Maurice, Count, of Nassau, in Brazil, 147, 148
Maximilian, Ferdinand, Archduke of Austria and Emperor of Mexico, 463, 464
Mayapan, 23
Mayas, cradleland of, 21; and Old Empire, 21–22; and New Empire, 23; roads connecting cities of, 24; political organization of, 24–25; houses, dress, and food of, 25–26; economic activities of, 26–27; architecture of, 28–30; art of, 30–31; glyphs and writing of, 31–32; numerical system of, 32–33; calendar of, 33; astronomical knowledge of, 33–34; religion of, 34–35
Mayo, Henry T., 481
Mayorazgos, 586
Mazorca, 657
Meiggs, Henry, 569, 600
Melero, Miguel, 770
Melero, Miguel Ángelo, 770
Melgarejo, Mariano, 553–554
Melgarejos, 553
Mella, Ramón, 375, 376
Mendoza, Antonio, sends out exploring expeditions, 121; appointed viceroy of New Spain, 157–158; subjected to residencia, 162; work for education, 211
Mendoza, Pedro de, 141
Menéndez, Pedro, 123
Mennonites in Paraguay, 630–631
Menocal, Armando, 770–771
Menocal, Marío García, 400–405
Mera, Juan León, 756
Merriman, Roger B., 133, 149, 162
Mexico, becomes independent of Spain, 315; under Agustín Iturbide, 443–444; and constitution of 1824, 445–446; early political disorders in, 446–449; and revolt of Texas, 449–451; and war with the United States, 452–456; demoralization in, 457–458; revolt under Álvarez, 458–459; and legislation against the Church and the army, 459–460; War of the Reform in, 461–462; and foreign claims, 462; and Maximilian, 463–465; non-political development in, before the accession of Díaz, 466–470; government of, under Díaz, 470–472; economic development of, under Díaz, 472–474; disadvantages to, from

Díaz's rule, 474–477; revolt in, against Díaz, 478; under Madero, 478–479; under Huerta, 479–482; under Carranza, 482–485; under Obregón, 485–488; under Calles, 488–494; under Portes Gil, 494–495. *See also* New Spain
Mexico City, 6, 118, 244
Michelina, Arturo, 773
Miguel, Prince of Portugal, 691, 692
Minerals of Latin America, 4–5
Mining, in aboriginal America, 27; in Spain, 66–67; in the Spanish Indies, 194–196; in colonial Brazil, 260–262; in Cuba, 410; in Central America, 438–439; in Mexico, 466, 472, 475; in Colombia, 515; in Venezuela, 534–535; in Ecuador, 548; in Bolivia, 554, 561–562; in Peru, 566, 570, 579–580; in Chile, 593, 604, 611, 616; in Brazil, 722
Miranda, Francisco, activities of, in Europe, 290–291; and struggle for Venezuelan independence, 294–297; plans of, for American confederation, 346
Mitas, 206
Mitla, 37
Mitre, Bartolomé, and Francisco López, 624; governor of Buenos Aires, 663; characteristics and early career of, 664; defeats Urquiza, 664; as president of Argentina, 664–666; again candidate for presidency, 669; and political situation in Argentina in 1891, 675; writings of, 762
Misioneros, 182
Moctezuma II, 115–118
Modyford, Thomas, 174
Mohammedans, conquer Spain, 71; government of, in Spain, 72; later invasions of, 72–73; agriculture under, 73; education and learning under, 73–74; architecture of, 74–75; persecution of, 83, 89–90. *See also* Moors
Monagas, José Gregório, 526
Monagas, José Tadeo, 525–527
Monroe, James, 340, 343
Monroe Doctrine, origin and provisions of, 341–344; reception of, 344–345; and boundary dispute between British Guiana and Venezuela, 531; and Argentina, 673; Roosevelt and, 785–786; Roosevelt corollary of, 786; Latin-American suspicion of, 792, 793; Wilson and, 789–790; redefinition of, 797
Monteagudo, Bernardo, 293, 349
Montejo, Catalina de, 235
Montejo, Francisco de, 119
Montes, Ismael, 559, 560–561
Montes del Valle, Agripina, 755
Montesquieu, Charles de Secondat, Baron de, 153 n.
Monteverde, Domingo, 296–297
Montt, Jorge, 607, 608–609
Montt, Manuel, as minister of education in Chile, 595; as president of Chile, 596–599
Monvoisin, Raimundo, 775–776
Moors, in Spain, 90; in Portugal, 93, 99. *See also* Mohammedans
Moraes Barros, Prudente de, 712, 713
Morazán, Francisco de, defeats Conservatives in Central America and becomes head of government, 413; and the Church, 413–414; radical reforms under, 414–415; conflict of, with Conservatives and Carrera, 415–416; death of, 416
Morelos, José María, 314
Moreno, Mariano, 293, 302–303
Morgan, Henry, 174–175
Morillo, Pablo, 301
Morones, Luis N., 487
Morrow, Dwight W., 491–492, 494, 795
Mosquera, Tomás Cipriano de, 501–502, 504
Mosquito Indians, and British commerce in Spanish Indies, 176; British protectorate over, 417–418; British treaties with Honduras and Nicaragua regarding claims of, 419–420
Müller, Lauro, 718
Music, in Spanish Indies, 220–221; in colonial Brazil, 268; in present-day Latin America, 738
Mutis, José Celestino, 215

Index

Nabuco, Joaquim, 695, 703, 708, 715, 768
Nahua-speaking peoples, 20, 36–38
Napoleon III and Mexico, 462–463, 464
Nariño, Antonio, 289–290
Narváez, Panfilo de, 117, 121
Nasca, 50, 51–52
National City Bank of New York, 366, 438
Natural History Museum of New York, 50 n.
Navarre, 77
Negro blood, in Portugal, 100; in Spanish Indies, 229–230; in Dominican Republic, 387; in Brazil, 729, 731; in Venezuela, 731; in Haiti, 731
Negroes, and Las Casas, 206; in Brazil, 269–270; immigration of, from the United States to Haiti, 360–361; revolt of, in Cuba, 400
Nervo, Amado, 750–751, 788
New French Canal Company, 508, 510
New Granada, 129, 298, 301. *See also* Colombia and Great Colombia
New Laws, 206–207
New Spain, influence of Ferdinand VII's abdication in, 312–313; revolt of Hidalgo in, 313; revolt in, continued under Morelos, 314; counter revolt in, under Agustín de Iturbide, 314–315. *See also* Mexico
Nezahualcoyotl, 46–47
Nhambiquara Indians, 730 n.
Nicaragua, Indian chief, 114
Nicaragua, Lake, 7
Nicaragua, and British encroachments, 418; asks admission to the American Union, 418; internal strife in, 427–428; and William Walker, 428–429; under Conservative rule, 429; under Zelaya, 430–431; occupied by United States marines, 431–432; and Bryan-Chamorro Treaty, 432–433; withdrawal of marines from, 434; second United States occupation of, 434–435. *See also* Central America
Nicuesa, Diego de, 112
Niño, Andrés, 113–114
Nobrega, Manoel, 249
Noche Triste, 118
Nombre de Dios refounded, 113
Noreña, Miguel, 771
Núñez, Rafael, early career of, 505; as Conservative ruler of Colombia, 505–507, 513
Nuttall, Zelia, 33

Obregón, Alvaro, defeats Villa, 482; revolts against Carranza, 484; elected president of Mexico, 485; occupies Mexico City, 485; and foreign claims, 485–486; and labor, 486–487; and public education, 487–488; supports Calles for presidency, 488; is reëlected and assassinated, 493
Ocampo, Sebastián de, 111
Ocantos, Carlos María, 761–762
O'Donojú, Juan, 315
Ogé, Vincent, 282–283
Ogeron, Bertrand d', 276
O'Higgins, Bernardo, early revolutionary activities of, 305; as dictator of Chile, 585–586; exile and death, 586
Ojeda, Alonzo de, 112, 123
Omayyads, 72
Olaya Herrera, Enrique, 513
Oliveira Lima, Manoel de, 768–769
Olmedo, José Joaquín, 755–756
Olney, Richard, 531
Ombú, 9
Oñate, Juan de, 123
Order of Christ, Knights of the, 97
Orellana, Francisco de, 137–138
Oribe, Manuel, 636, 638
Orinoco River, 8
Orleans, Gaston d', Comte d'Eu, 626, 707, 719 n.
Orozco, José Clemente, 772
Ortíz Rubio, Pascual, 495
Ostend Manifesto, 329
Othón, José, 749
Ouvidor, 246
Ovando, Nicolás de, 109

Pacha, 53
Pachacamac, 61–62, 63

Pacific Ocean, discovered by Balboa, 112–113; crossed by Magellan, 126–128; as Spanish *mare clausum*, 173

Páez, José Antonio, and Bolívar, 497–498; leads in secession of Venezuela from Great Colombia, 499; as president of Venezuela, 523–525; and José Tadeo Monagas, 526; as dictator of Venezuela, 527; returns to exile, 527

Palenque, 21, 22

Palma, Ricardo, 757

Pampas, 9

Panama, establishes independence, 510; negotiates a canal treaty with the United States, 510; constitution of, 519; boundary dispute of, with Costa Rica, 519–520; relations of, with the United States, 520–521; progress of, since independence, 521–522

Panama Canal, concession to build, granted to French company, 505; taken over by United States, 508–510

Panama Canal Zone, 508, 510, 520

Panama City, founded, 113; destroyed by Morgan, 174–175

Panama Congress, 346–347

Pan-American Arbitration Conference, 796 n.

Pan-American Art Exhibition, 772

Pan-American Union, 779–780, 781

Pan-Americanism, 794

Pando, José Manuel, 559

Pan-Hispanism, 787–788

Paraguay, settled by Spaniards, 141–142; Jesuits in, 185–187; movement in, for independence, 303; influence of isolation on, 617; under Francia, 617–619; under Carlos Antonio López, 619–623; boundary disputes of, 621; under Francisco López, 623–626; boundary adjustments of, 626; political career since war with triple alliance, 628–630; boundary dispute with Bolivia, 629–630; economic development of, 630–632; education in, 633

Pardo, José, 582

Pardo y Aliaga, Felipe, 756–757

Paredes, Mariano, 452, 455

Parra, Félix, 771

Passos, Pereira, 716

"Pastry War," 451

Patagonians, 19

Paulistas as explorers and conquerors, 245 n., 251–253, 254, 260, 262

Paz Soldán y Unanue, Pedro, 757

Pearl-fishing, 196

Peçanha, Nilo, 717, 718

Pedrarias Dávila, 113

Pedro I, Emperor of Brazil, proclaims independence of Brazil, 322–323; character and training of, 686; and formation of constitution, 687–689; reasons for opposition to, 689–690; abdication and exile of, 694

Pedro II, Emperor of Brazil, and Uruguay, 638; accession of, to Brazilian throne, 694, 697; training and character of, 698; reign of, 698–709; deposition, exile, and death, 709–710; remains of, brought back to Brazil, 719 n.

Peixoto, Floriano, 709, 712, 713

Pelayo, legendary hero of Spain, 76

Pelucones, 589, 598

Penna, Affonso, 716–717

Peonage, 232, 441, 733–734

Peonía, 193–194

Peralta Barnuevo Rocha y Benavides, Pedro de, 216

Pereira, Duarte Coleho, 145

Pereira de Souza, Washington Luis, 721

Pérez, José Joaquín, 599

Pérez Bonalde, Juan Antonio, 752

Permanent Court of International Justice and Latin America, 791–792

Pernambuco, founded, 145; revolt of, against Pedro I, 690

Pershing, John J., 482, 572

Peru, Spanish conquest of, 132–137; revolutionary movement in, under San Martín, 308–309; circumstances contributing to bad political start in, 564–565; friction of, with Great Colombia, 565; union of, with Bolivia, 565–566; under Ramón Castilla, 566–567; decade of disorder in, 567–569; war of, with Spain, 568;

financial difficulties of, 570; in War of the Pacific, 570–571; and "Question of the Pacific," 571–574; financial adjustments of, after the war, 574–576; political conditions in, since the war, 576–577; constitution of 1919, 577; recent economic development of, 578–581; sanitation in, 582; education in, 582–583
Peru-Bolivian Confederation, 552–553, 591–592
Perusquía, Mariano, 226
Peruvian Corporation, 576, 578
Peso, 203
Peso de oro, 203
Pessôa, Epitacio, 791
Pétion, Alexandre, 359
Pezet, Juan Antonio, 568
Philip II, King of Spain, 86, 100–101
Philip III, King of Spain, 185
Philippa, Queen of Portugal, 95
Philippine Islands, reached by Magellan, 128; and trade with Spanish America, 168
Phœnicians in Iberian Peninsula, 66–67
Picón Febres, Gonzalo, 753
Pigafetta, Antonio, 126, 128
Pineda, Alonzo de, 120
Pining, Didrik, 103
Pino Suárez, José, 479
Pinto, Francisco Antonio, 588, 589
Pinzón, Martín, 105
Pinzón, Vicente, 105, 124
Pipiolos, 589
Pirates, 173–175
Pitta, Rocha, 267
Pizarro, Francisco, preparation of, to conquer Peru, 131–132; and Atahualpa, 133–136; establishes Spanish rule in Peru, 136; founds Lima, 136; is assassinated, 137
Pizarro, Gonzalo, 137–138
Platt, O. H., 337
Platt Amendment, provisions of, 337; and naval bases for the United States, 395; and United States intervention in Cuba, 398; opposition to, in Latin America, 407, 410, 785
Plaza, Nicanor, 776
Poder conservador, 448, 451
Poinsett, Joel, 10, 446
Poinsettia, 10
Polignac, Prince de, 342
Political parties in Latin America, 354–355
Politics, excessive interest of Latin Americans in, 351–352
Polk, James K., 454, 455
Pombal, Marquis of, 251 n., 261
Ponsonby, John, Viscount, 635
Popocatapetl, Mount, 4
Portales, Cea, and Company, 587
Portales, Diego, 350, 591, 592, 782
Porteños, 303, 648
Portes Gil, Emilio, 494–495
Porto Bello, 168, 170–171
Porto Rico, discovered, 107–108; settled, 111; and general movement for independence in Spanish Indies, 324, 325; junta of information regarding, 330; ceded to the United States, 335
Portucalia, 92
Portugal, early history of, in common with Spain, 92; becomes independent, 93; struggles against Castile and León, 93–95; expansion of, towards south and east, 95–97; the Church and religious persecution in, 98–99; development of royal power in, 98–99; decline of, 98–100; "sixty years' captivity" of, 101; revolt of, against Spain and reëstablishment of independence, 147–148; invaded by Napoleon's army, 320; recognizes independence of Brazil, 689–690
"Portuguese party" in Brazil, 692
Prado, Eduardo, 784
Prado, Mariano Ignacio, 568, 570
Prescott, William H., 135
Presidencies, 156
Presidios, 188
Prestación vial, 560
Price-fixing, in Spain, 90; in the Spanish Indies, 202
Priestley, Herbert Ingram, 449, 471
Prieto, Joaquín, 589, 591

Printing, in Spanish Indies, 218–219; banned in colonial Brazil, 266; and move for Spanish-American independence, 293–294
Procuradores, 80
Pronunciamentos, 353
Protestants, in Mexico, 468; in Great Colombia, 497, 519; in Chile, 602; in Brazil, 689, 733; in Latin America, 733, 742
Pueyrredón, Honorio, 679–680
Pueyrredón, Juan Martín, 306, 307, 649
Purics, 55

Quebracho, 631
Quechua language, 53, 60, 61
Quechuas, 20
Querejazu, Mariana de, 235
Quesada, Ernesto, 648, 787, 789
Quesada, Gonzalo Jiménez de, 129–130
Quesada, Vicente, 673
"Question of the Pacific," 571–573, 574
Quetzalcoatl, 23, 29, 34, 36
Quinto, 171–172, 194, 261–262
Quipus, 60–61
Quirigua, 21–22
Quiroga, Facundo, 762
Quito, presidency of, freed from Spain, 301–302; united with Colombia, 302. *See also* Ecuador
Quito, secondary capital of the Incas, 53
Quivira, 121–122

Raleigh, Sir Walter, 715
Ramírez, Alejandro, 770
Ranchos, 475
Rebello, José Silvestre, 345–346
Reccared, 69
Recognition of Latin-American countries, 338–340
Reconcentrados, 332
Rectores, 182
Red Cross in Latin America, 742
Reducciones, 183
Reed, Walter, 391–392
Rengifo, Manuel, 592, 594
Repartimientos, 205
"Republic of the Sacred Heart of Jesus" (Ecuador), 545
"Republic of Sierra Madre," 449
Residencia, 85, 161–162
Restrepo, Carlos E., 512, 518
Reyes, Rafael, 511, 518
Reyles, Carlos, 759
Ricos hombres, 82
Rio Branco, Baron do, 715
Rio Branco, Conselheiro Paranhos, Viscount do, 703
Rio Branco Law, 703, 707
Rio de Janeiro, founded, 147; beautified and made sanitary, 716
Rio Grande, 8
Rivadavia, Bernardino, 650–651, 652–653
Rivera, Diego, 772–773
Rivera, Fructuoso, 636, 637
Roca, Julio, campaigns of, against the Indians, 670; crushes revolt in Buenos Aires, 671; as president of Argentina, 672–673; second term of, as president, 676, 677
Rocafuerte, Vicente, 538–540
Rockefeller Foundation, 372, 548
Roderic, Gothic king of Spain, 71
Rodó, José Enrique, 759–760
Rodríguez, José Joaquín, 421
Rodríguez, Martín, 650, 652
Rodríguez Galvan, Ignacio, 749
Rodríguez Juárez, Juan, 227
Rojas, J., 773
Romañach, Leopoldo, 770–771
Romans in Spain, 67–68
Romero, Silvio, 768
Roosevelt, Theodore, and the Dominican Republic, 382–383; and Cuba, 398; and Central America, 430; and Colombia, 507–511; and Venezuela, 531; Rubén Darío's ode to, 785; views of, on the Monroe Doctrine, 785–786
Root, Elihu, 337, 788–789
Rosario Mining Company, 439
Rosas, Juan Manuel, and Paraguay, 621; and Uruguay, 636–638; early career of, 654–655; governmental policy of, as head of the Argentine

confederation, 655–657; lack of progress of Argentina under, 657–658; and foreign relations, 658–659; overthrow and exile of, 659; comment upon qualities of, 659–660; services of, to Argentina, 660
Ross, Edward A., 475, 738–739
Rotos, 232
Roy, Eugene, 373
Ruelas, Julio, 772
Rush, Richard, 342
Russell, John H., 369, 373
Russia, 343

Sá, Mem de, 147
Sacasa, Juan B., 434
Sacasa, Roberto, 429–430
Sáenz Peña, Luis, 675–676
Sáenz Peña, Roque, 678
Sagres, 96
Sahagún, Bernardino de, 217
Saint Augustine founded, 123
Saint-Domingue, early settlement by French, 276; the Church in, 277; government of, 277; economic prosperity of, 277–278; social classes in, 278–280; corruption of population in, 280–281; French Revolution and, 281; revolt in, 282–286; Toussaint L'Ouverture and, 284–286; Napoleon Bonaparte and, 285–286; establishes independence, 286. *See also* Hispaniola, Haiti, Santo Domingo, *and* Dominican Republic
Saint James the Greater. *See* Santiago
Saint Rosa of Lima, 184
Salas, Antonio, 773–774
Salas, Rafael, 773–774
Salas, Ramón, 773–774
Salazar, Juan de, 141
Salvador, votes for annexation to the United States, 317; resentment of, toward Guatemala, 412; political career of, 425–426; protests against the Bryan-Chamorro Treaty, 432–433. *See also* Central America
Salvatierra, Juan María, 185
Sam, Vilbrun Guillaume, 366–367
Samaná Bay, 378–380, 381
San Carlos Academy of Fine Arts, 225
Sánchez de Vargas, Hernando, 138
Sanclemente, Manuel Antonio, 507
Sancta Casa de Misericórdia, 250
Sandino, Augusto, 435
San Domingo Improvement Company, 381, 382
Sandoval, Francisco Tello de, 162
Sanfuentes, Enrique Salvador, 605, 608
Sanitation and health, in Spanish Indies, 242 and n.; in Haiti, 365, 370–372; in Cuba, 391–392; in Mexico, 489–490; in Ecuador, 548; in Brazil, 716; in Latin America in general, 736–737, 742
San Juan River, potential importance of, 7
San Juan Teotihuacán, 36–37
San Martín, José de, becomes governor of Cuyo, 305; early career of, 305; trains Army of the Andes, 305–307; favors independence from Spain, 307; emancipates Chile, 307–308; carries movement for independence into Peru, 308; negotiates with Spanish viceroy, 308–309; proclaims independence of Peru, 309; confers with Bolívar at Guayaquil, 309–311; withdraws from the revolutionary army and retires to Europe, 311; governmental plans for Spanish America, 349
San Salvador (island) discovered by Columbus, 105
Santa Ana de Coro, 130
Santa Anna, Antonio López de, rise of, 444; supports Vicente Guerra, 447; characteristics of, 447; first presidential term of, 448; and revolt of Texas, 450; and "Pastry War," 451; as president of Mexico, 451–452; and war with the United States, 456; as dictator of Mexico, 457–458; last years of, 458–459
Santa Cruz, Andrés, 551, 552–553
Santa Fé, New Mexico, founded, 123
Santa Hermandad, in Spain, 84; in New Spain, 233
Santa María, Domingo, 602–604

Santana, Pedro, 375–378, *passim*
Santander, Francisco, and Monroe Doctrine, 344; and Panama Congress, 346; favors federal principles, 496; opposition to, in Great Colombia, 497; and Páez, 497–498; and plot against Bolívar, 498; elected president of New Granada, 499; policy of, 500; incites rebellion, 501
Santiago, Spain, 78, 88, 116, 134
Santiago, Chile, founded, 139
Santiago, Miguel de, 226–227
Santo Domingo, cession to France, 284, 318; conquest of, by Toussaint L'Ouverture, 284, 318; economic decline in, 317–318; reoccupied by Spain, 318; establishes independence from Spain, 318; conquered by Haiti, 319, 360; weakness of, 374; under Haitian rule, 374–375; establishes independence, 375. *See also* Dominican Republic
Santo Domingo City founded, 108
Santo Domingo Company, 173
Santos, Marchioness of, 691
Sarmiento, Domingo Faustino, as educator in Chile, 595; early career of, 665, 666; characteristics of, 666; elected president of Argentina, 666; and Urquiza, 667; and work for education in Argentina, 668–669; writings of, 762
Sársfield, Dalmacio Vélez, 665
Saudades, 765, 766
Schaerer, Edward, 628
Scholarship in Spain, 73–74, 90; in the Spanish Indies, 214–217
Schouten, Willem, 174
Scott, Winfield, 456, 457
Sebastião, king of Portugal, 99
Serra, Junipero, 187
Serra, Miguel José. *See* Serra, Junipero
Serrano, Francisco, 493
Sertões, 253
Service technique, 372
Seville, 166–167
Sheffield, James R., 490, 491, 794
Sierra, Justo, 751
Sierra Madre Occidental, 3
Sigüenza y Góngora, Carlos de, 216
Silva, Rodrigo Augusto da, 708
Silva Pessôa, Epitacio da, 719, 720
Silva Xavier, Joaquim José da, 320
Sixtus, Pope, 87
"Sixty years' captivity" of Portugal, 101
Slave trade, African, with Portugal, 96; with Spanish Indies, 177; prohibited in Great Colombia, 497; attempts to suppress, in Colombia, 501; treaty for abolishing, in Venezuela, 525; with Brazil, 703
Slavery, Indian, begun by Columbus, 109; in Spanish Indies, 204–207; in colonial Brazil, 249, 263, 264; slavery, Negro, introduced into modern Europe by Portuguese, 96–97; characteristics of, in the Indies, 208; in Brazil, 249–250, 264–265; in Saint-Domingue, 278, 279; in Cuba, 327, 328; abolished in Central America, 412; abolished in Venezuela, 526; abolished in Ecuador, 540; abolished in Peru, 567; abolished in Paraguay, 626; abolished in Uruguay, 643; abolished in Argentina, 661; characteristics of, in Brazil, 702–703; abolished in Brazil, 703, 707–708; disappearance of, from Latin America, 734
Slidell, John, 454–455
Smuggling in the Spanish Indies, 175–178, *passim*
Soares de Souza, Gabriel, 267
Sociedad de Beneficencia, 651
Sociedad Patriótica de Lima, 349
Society, in the Spanish Indies, 228–244; in colonial Brazil, 269–274; in present-day Brazil, 729; in Latin America since 1825, 731–742
Soffia, José Antonio, 763
Solís, Juan Díaz de, 124, 165
Solórzano, Carlos, 434
Sorata, Mount, 4
Soulouque, Faustin, 362, 376–377
Southerners from United States in Brazil, 702
South Sea. *See* Pacific Ocean
South Sea Company, 177, 178

Souza, Martim Affonso de, 144
Souza, Thomé de, 146
Spain, early invasions of, 66–67; under Romans, 67–68; under Goths, 68–70; under Mohammedans, 71–75; revival and development of, by Christians, 75–84; under Isabella and Ferdinand, 84–92; recent relations of, with Latin America, 787–788. *See also* Iberian peninsula *and* Portugal
Spanish Main, 129
Spanish March, 77
Spanish people, national characteristics of, 91–92
Spinden, Herbert J., 27–28
Spiritualism, 733
Sports in Latin America, 737–738
Stimson, Henry L., 435
Strangford, Percy Clinton Sydney Smythe, Viscount, 320
Subdelegados, 160
Sublette, Carlos, 525
Sucre, Antonio José de, 301–302, 311, 565
Suevi, 68
Sumner, Charles, 380
Suprema, 88
Syllabus of Pope Pius IX, 705

Taboada Lemos, Gil de, 219
"Tacna and Arica Question." *See* "Question of the Pacific"
Tacón, Miguel, 327
Taft, William Howard, and Colombia, 511
Tamoyo, 687–688
"Tampico incident," 481
Tarascans, 39
Tarik, 71
Taunay, Alfredo de Escragnolle, 766–767
Taylor, Zachary, 455, 456
Tecpanecs, 38–39
Tejedor, Carlos, 671
Tello, Julio, 49, 52, 583
Tenochtitlán, built, 38; under the Aztecs, 39, 42; conquered by Cortes, 117–118; rebuilt and renamed, 118
Terrazas, Luis, 475
Texas, colonized by Americans, 449–450 and n.; revolt and declaration of independence of, 450–451; annexed to the United States, 453; and the war between the United States and Mexico, 455, 456
Tezcoco, 38, 46
Tezontle, 223
Theodosian Code, 70
Theosophy in Latin America, 733
Theresa, Countess of Portugal, 93
Theresina Christina, Empress of Brazil, 698, 719 n.
"Thirty-three Immortals," 634
Tiahuanaco, 50
Tierra Firma, 168
Tina, Mount, 3
Tiradentes. *See* Silva Xavier, Joaquim José da
Tiro Nacional, 671
Titicaca, Lake, 7–8
Tlacopán, 38
Toledo, Council of, 69
Toledo, Francisco de, 211
Tolima, Mount, 4
Tolsa, Manuel, 226
Toltecs, invasion of Yucatan by, 36; cultural characteristics of, 36–37
Torquemada, Tomás, 86, 87–88
Torres, Manuel, 340
Tortilla, 237
Totonacs, 39
Tovar y Tovar, Martín, 773
Trade, among the Mayas, 27; among the Aztecs, 42; of the Phœnicians in Spain, 66–67; of the Greeks in Spain, 67; of Moorish Spain, 73; under Isabella and Ferdinand, 90; of Portugal with Africa, 95–97; of Portugal with the Orient, 99; in Indian slaves by Welsers in Venezuela, 130; between Spain and the Indies, 164–178; in the Spanish Indies, 186, 188, 201–204; between Portugal and colonial Brazil, 254–257; in colonial Brazil, 263; of Cuba, 331–332, 401; of Central America, 440; of Mexico, 472; of Colombia, 515–516; of Panama, 522; of Venezuela, 525, 528–

529, 535; of Ecuador, 548; of Bolivia, 561–562; of Peru, 566, 581; of Chile, 585, 595, 597, 616; of Paraguay, 618–619, 632; of Uruguay, 646; of Argentina, 682; of Brazil, 700, 722–726, *passim*

Trade winds, 6

Transmarine Council, 245

Transportation, among the Mayas, 24, 27; among the Incas, 54–55; in Roman Spain, 67; between Spain and the Indies, 168–170; in the Spanish Indies, 203–204; in colonial Brazil, 274; in Haiti, 364, 365, 370; in the Dominican Republic, 388–389; in Cuba, 391, 409; in Central America, 440–441; in Mexico, 467, 472–473; in Colombia, 502, 516–517; in Panama, 522; in Venezuela, 524, 529, 534; in Ecuador, 542, 546, 548; in Bolivia, 560–561; in Peru, 566, 569, 576, 578–579; in Chile, 597, 600, 605, 611; in Paraguay, 620, 632; in Uruguay, 644; in Argentina, 663, 664–665, 682–683; in Brazil, 700–701, 726–727

Treaties of Washington (1907), 430–432; (1922–1923), 437

Treaty, of Windsor, 95; of Tordesillas, 107, 124, 252; of Quillén, 140; of Utrecht, 177; of "Exchanges," 187n.; of San Ildefonso (1777), 252n.; of Ryswick, 276; of Zanjón, 330; of Paris (1899), 335; Bryan-Chamorro, 432–433; of Guadalupe-Hidalgo, 456; Hay-Herrán, 508; Hay-Bunau-Varilla, 510, 520; Thomson-Urrutia, 511; of Ancón, 556, 571

Trejo, Fernando de, 212

Trent, Council of, 181, 190

Trist, Nicholas P., 456

Trujillo founded, 119

Ttahuantinsuyu, 53

Tula. *See* San Juan Teotihuacán

Tulum, 21

Tupac Amaru, 159–160, 287

Ulloa, Francisco de, 120

Ulpa, 237

Unión Cívica, 674

United States of America, and the wars for Spanish American independence, 290; makes war against Spain, 333–335; and Cuba, 335–337, 391–395, 398–399, 402–403, 404–406; and Haiti, 365–366, 367–373; and the "Question of the Pacific," 572–574; and Chile, 609; and Paraguay, 622; and Argentina, 658, 679–680; fear and suspicion of, in Latin America, 782–787, 788–797, *passim*

Ureña de Henríquez, Salomé, 390, 745–746

Uriburu, José Evaristo, 676, 677

Urquiza, Justo José, 659; as president of Argentina, 660–664, 665, 667

Uruguay, under control of Brazil, 634; established as an independent republic, 635; rise of Colorados and Blancos in, 636; struggle of, against Rosas, 637–638; in war against Paraguay, 639; later Colorado rule in, 639–641; constitution of (1918), 641–642; qualities of population of, 642–643; economic development of, 644–646; education in, 647. *See also* Banda Oriental

Uruguay River, 9

Uxmal, 23

Valderrama, Esteban, 770–771

Valdivia, Pedro de, 139, 140

Valorization of coffee in Brazil, 725

Valverde, Vicente de, 134, 136

Vandals, 68, 71

Vanderbilt, Cornelius, 428, 429

Varas, Antonio, 598–599

Varela, José Pedro, 647

Vargas, José M., 524

Varnhagen, Francisco Adolfo do, 768

Vasconcelos, José, 485, 487–488, 495

Vásquez, Horacio, 386–387

Veedores. *See Visitadores*

Veiga, Evaristo da, 693, 695

Velázquez, Diego de, 114

Venezuela, named, 124; first settlement in, 130; under the Welsers, 130; struggle for independence in, 291,

294–301; secedes from Great Colombia, 498–499; first constitution of, 523; under Páez, 523–525; under the Monagas rule, 525–527; increased political disorders and warfare in, 527; era of Guzmán Blanco in, 528–530; boundary dispute of, with British Guiana, 530–531; under Castro, 531–532; under Gómez, 532–536
Vera Cruz, founded, 115; bombarded by the French, 451; captured by United States forces, 456, 481
Veríssimo, José, 268, 768
Vermay, Jean Baptiste, 770
Vertíz, Juan José de, 218–219
Vespucci, Amerigo, 110, 123, 165
Veterans' and Patriots' Association, 407
Viceroy, in the Spanish Indies, 157–159; in colonial Brazil, 246
Victoria, Guadalupe, 446
Vicuña, 12, 57
Vicuña, Claudio, 608
Vicuña Mackenna, Benjamin, 601–602, 764
Vieira, Antonio, 249
Vieira, João Fernandes, 148
Villa, Francisco, 480, 482
Villa real, 195
Villazón, Elidoro, 560
Villegagnon, Nicholas Durand, 146
Virgin of Guadalupe, 183, 184 and n.
Visigoths in Spain, 68–70
Visitadores, 85, 161–162
Volcanoes in Latin America, 4

Waldseemüller, Martin, 110
Walker, William, filibuster, 428–429, 782
Walsh, R., 689 n., 695
Wars: for independence in the Spanish Indies, causes of, 287–294; in northern South America, 294–302; in southern South America, 302–311; in New Spain, 311–316; in Guatemala, 316–317; Ten Years' War in Cuba, 330–331; war between the United States and Spain, 333–335; War of the Restoration, in Santo Domingo, 378; World War and Cuba, 401, 403; war between the United States and Mexico, 455–457; War of the Pacific, 555–559; Paraguayan War with the triple alliance, 624–626; Great War, in Uruguay, 637; and Argentina, 678–679; and Brazil, 718; and Latin America, 790–791
"Watchful waiting," 480
Water Witch, 622
Welles, Sumner, 386
Welsers, Augsburg banking firm, and Venezuela, 130
Westendorp and Company, 381
Weyler, Valeriano, 332, 333
Wheelwright, William, 593, 597, 664
White, Edward Douglass, 520
Wilson, Henry Lane, 480
Wilson, Woodrow, and Huerta of Mexico, 480, 481 and n., 482; and Colombia, 511; and Pan-Americanism, 789–790, 792
Woman's movement in Latin America, 739–742
Woman's suffrage in Latin America, 741–742
Women, education of, in Spanish Indies, 209–210; status of, in Spanish Indies, 233–235; status of, in colonial Brazil, 271, 273–274; of Saint-Domingue, 278, 280; status of, in present-day Latin America, 738–742
Wood, Leonard, 335–337, 391–394

Yahgans, 19
"Yankee peril," 787
"Yankeephobia," 782
Yegros, Fulgencio, 617–618
Yucatan conquered by the Spaniards, 119
Yungas, 561

Zacatula, 120
Zapotecs, 37–38
Zayas, Alfredo, 400, 402, 404–407
Zelaya, José Santos, 430–431, 507
Zenea, Juan Clemente, 747–748
Zorilla de San Martín, Juan, 759
Zuloaga, Félix, 461
Zumárraga, Juan, 183, 211

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